



Data Center User Guide

for the **AXIS**TM **Retail Management System**

Software Version 2.3

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General Operating Procedures

Login, Logout, and Lock Procedures

Login, Logout, and Lock Procedures control access to the **Data Center** application, specific functions, and workstations.

- [Log In to the Data Center Application \(see page 16\)](#)
- [Log In with the Database Connection Settings Window \(see page 18\)](#)
- [Lock the Data Center Terminal \(see page 19\)](#)
- [Unlock the Data Center Terminal \(see page 20\)](#)
- [Close the Data Center Application \(see page 21\)](#)
- [Respond to a Close/Continue Window \(see page 22\)](#)
- [Log Out of the Data Center Application \(see page 23\)](#)

Standard Procedures

Standard Procedures are routine actions that are performed and referenced as directed steps within larger, feature-specific procedures.

- [Select a Date \(see page 24\)](#)
- [Select a Single Product \(see page 27\)](#)
- [Select One or More Products \(see page 28\)](#)
- [Select or Add a Firearm Customer \(see page 29\)](#)
- [Select a Firearm Vendor \(see page 32\)](#)
- [Select a Transfer Agent \(see page 34\)](#)
- [Select a Firearm from the Firearm Inventory Window \(see page 36\)](#)
- [Describe a Firearm \(see page 37\)](#)
- [Describe a Serialized Nonfirearm Item \(see page 39\)](#)
- [Sort and Filter Onscreen Data \(see page 40\)](#)
- [Sort and Filter Reporting Screen Data \(see page 44\)](#)
- [Save and Print a Document \(see page 48\)](#)
- [Export a Report to Excel \(see page 49\)](#)

Log In to the Data Center Application

1. Locate the **AXIS Data Center** icon on the desktop.



2. Click the **AXIS Data Center** icon to display the **Data Center Initialization** window.

Note: Some computers may be configured to require a double-click to open an application.



3. When initialization finishes, the window closes and the system displays the **Data Center Login** window.



4. Enter the employee number in the **Employee #** field.
5. Enter the password in the **Password** field.
6. Click the **Login** button to display the **Data Center Main Menu** screen.



Log In with the Database Connection Settings Window

Complete the following procedure to configure the AXIS RMS to communicate with the database server.

Note: This procedure is applicable only for new AXIS RMS installations and must be completed the first time any AXIS RMS application is opened.

1. Click the appropriate AXIS application (**Register**, **Data Center**, or **Form 4473**) icon on the desktop to display the **Database Connection Settings** window.

Note: Some computers may be configured to require a double-click to open an application.



AXIS

Please fill the Database Connection Settings and click submit

Server Name

Database Name

User Name

Password

Please contact RTG Support at 1-800-547-7120 for assistance

Cancel Submit

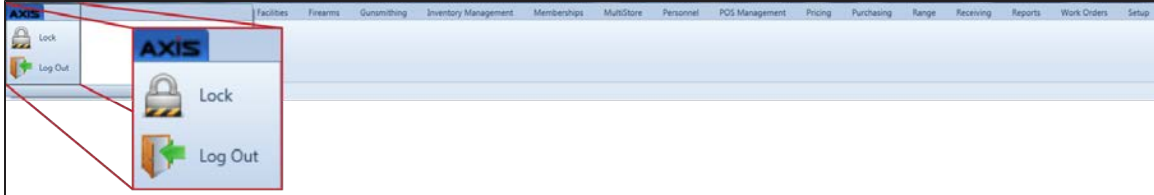
2. Enter the appropriate values in the **Server Name**, **Database Name**, **User Name**, and **Password** fields.
3. Click the **Submit** button to encrypt the data and save the connection string in the configuration file.
4. When the application's login window appears, complete the login procedure.

Lock the Data Center Terminal

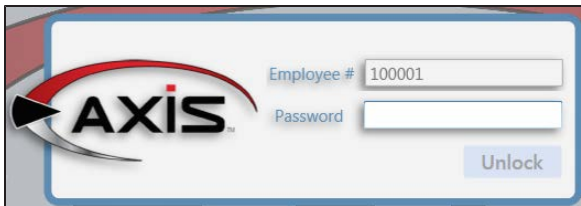
This procedure allows a user to lock the present instance of the **Data Center** application until he/she returns and unlocks it.

Note: A lock does not prevent another employee from opening another instance of the **Data Center** application.

1. Click the **AXIS** tab to display the **Access Control** menu.



2. Click the **Lock** button to display the **Data Center Unlock** window.



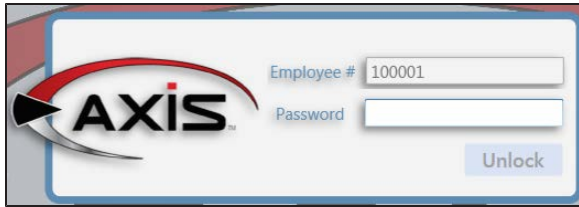
3. When ready to return, [Unlock the Data Center Terminal \(see page 20\)](#).

Unlock the Data Center Terminal

This procedure allows the user that locked an instance of the **Data Center** application to unlock it.

Note: If another employee needs to use the **Data Center** application on this terminal, he/she may open another instance of it.

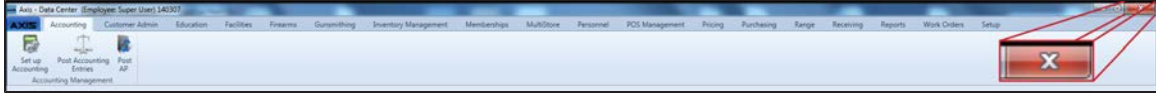
1. Locate the terminal displaying the **Data Center Unlock** window.



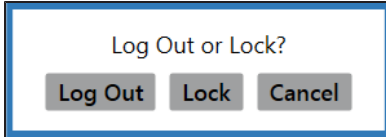
2. Note the employee number in the **Employee #** field.
3. Enter the employee's password in the **Password** field.
4. Click the **Unlock** button to remove the window and reactivate the **Data Center** screen.

Close the Data Center Application

1. Locate the application's close button in the upper right corner of the window.



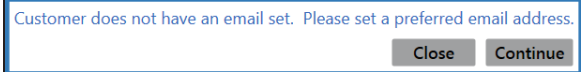
2. Click the window's **Close** (white X on red) button to display the **Log Out or Lock?** window.



3. Click the **Log Out** button to close the application.

Respond to a Close/Continue Window

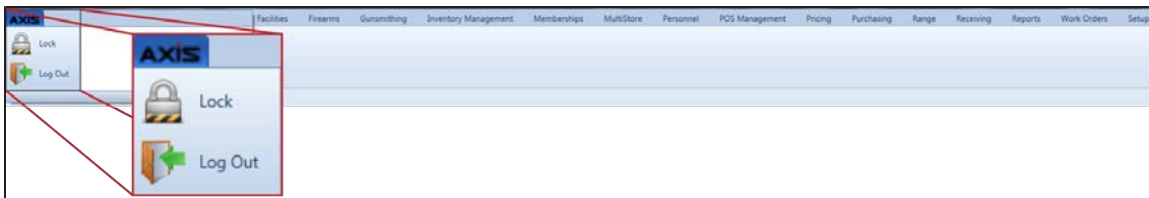
If the system displays a message window displaying **Close** and **Continue** buttons:



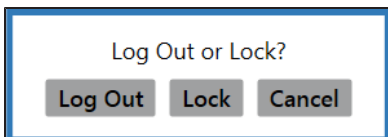
- Click the **Continue** button to close the message window and continue working in the system.
- Click the **Close** button to close the Data Center application.

Log Out of the Data Center Application

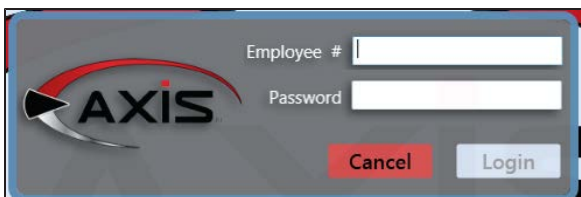
1. Click the **AXIS** tab to display the **Access Control** menu.



2. Click the **Log Out** button to display the **Log Out or Lock?** window.



3. Click the **Log Out** button to display the **Login** window.



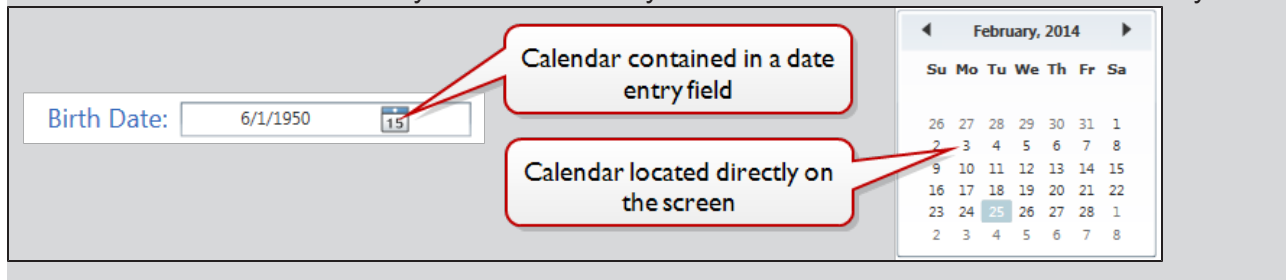
4. Complete either of the following procedures as appropriate:
 - Click the **Cancel** button to close the window and clear this instance of the application.
 - Allow an employee to [Log In to the Data Center Application \(see page 16\)](#) from this window.

Select a Date

Complete the following procedure to select a date from an onscreen calendar.

1. Navigate to the onscreen calendar.

Note: An onscreen calendar may be located directly on a screen or contained within a date entry field.



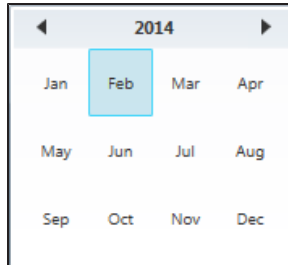
2. If the calendar is contained within a date entry field, click the calendar button to display the calendar feature.



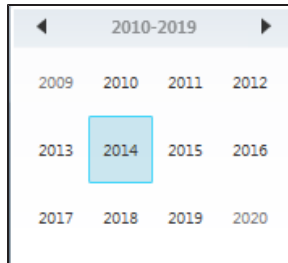
3. Complete the following procedures as needed to display and select the desired date:

Select a Year

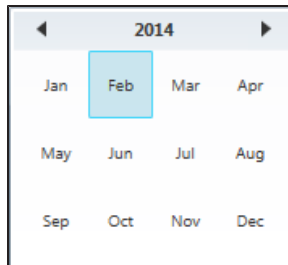
1. Click the calendar's month/year title (e.g., **February, 2014**) to display months for the currently-selected year.



2. Click the calendar's year title (e.g., **2014**) to display a range of years surrounding the currently-selected year.



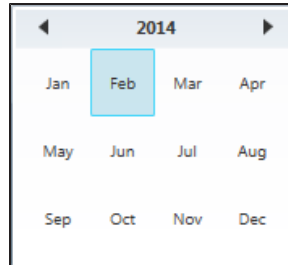
3. If needed, click the arrow (◀ ▶) buttons on either side of the title to navigate to an earlier or later range of years.
4. Click the desired year to select it and display months for the selected year.



5. Select the desired month and day.
-

Select a Month

1. Complete either of these procedures to display a different month.
 - Click the arrow (◀ ▶) buttons on either side of the title as needed to navigate to and select a previous or later month.
 - Select the desired month from a year's range:
 1. Click the calendar's month/year title (e.g., **February, 2014**) to display months for the currently-selected year.



2. Click the desired month to select it.
2. Select the desired day.

Select a Day

Click the desired day/date in the displayed month to select it.

Select a Single Product

1. Navigate to the **Product Search** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Case Quantity screen** (either **Search** button)
 - **Product Kits screen** (**Add Kit Item** button in a kit's **Product Kit Items** record)
 - **Purchase Orders screen** (**Add Product** button in a purchase order's **Edit Purchase Order** window)
 - **Receiving Details screen** (**Product Search** button)
 - **Open Work Orders (gunsmithing) screen** (a work order's **Product** button)
 - **Open Work Orders (non-firearm) screen** (a work order's **Product** button)
 2. Click the indicated button to display the **Product Search** window.

Please select a single item			
UPC	Description	QoH	Price
<input type="checkbox"/> 023614072010	Browning 1911-22 COMP AUTO Black	0	\$549.00
<input type="checkbox"/> 076683239143	Speer 327 Federal 115 Grain Gold Dot	16	\$24.99
<input type="checkbox"/> 1123456	ZOMBIE WITH KID TARGET	106	\$1.99
<input type="checkbox"/> 112345678	ZOMBIE WITH WOMAN	62	\$1.99
<input type="checkbox"/> 123	ZOMBIE CLOWN	69	\$1.99
<input type="checkbox"/> 123345	Blue Widget	-7	\$9.99
<input type="checkbox"/> 123456789123	TEST ITEM	20	\$35.99
<input type="checkbox"/> 29465027131	Federal Field & Range 12 Ga. 2 3/4" 1	-7	\$9.99
<input type="checkbox"/> 39873336	BAD GUY TARGET	37	\$1.99
<input type="checkbox"/> 600000000000	PISTOL LANE	0	\$20.00
<input type="checkbox"/> 600000000001	PISTOL SECOND SHOOTER	0	\$20.00
<input type="checkbox"/> 600000000002	LONG GUN LANE	0	\$20.00
<input type="checkbox"/> 600000000003	LONG GUN SECOND SHOOTER	0	\$20.00
<input type="checkbox"/> 600000000004	INTRO TO HANDGUNS	0	\$75.00

2. Complete any of these procedures to limit the number of products shown:
 - Enter all or part of a product's description in the **Description** field.
 - Enter all or part of a product's UPC code number in the **UPC** field.
 - Click an **Attribute** button and one of its associated **Descriptor** buttons. (Repeat as needed to further restrict products with additional attributes and descriptors.)
 - Click the **Clear** button to remove all Attribute/Descriptor filters.
3. Check a product's checkbox to select the product.
4. Click the **Select** button to close the **Product Search** window.

Select One or More Products

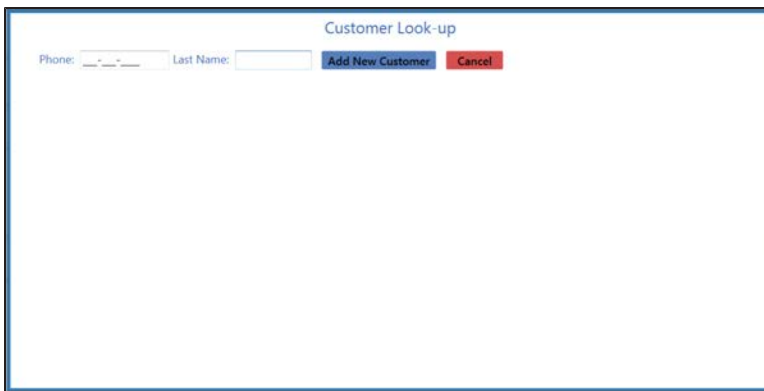
1. Navigate to the **Product Search** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Special Orders Report screen** (**Product Search** button in the order's **Special Order Request** window)
 - **Quick Pick Setup screen** (**Add** button in the contents section)
 - **Memberships screen** (**Add Products** button in a membership incentive's details record)
 - **Markup Categories screen** (**Add Products** button in a category's **Markup Category Items** record)
 - **Receiving Details screen** (**Product Search** button)
 2. Click the indicated button to display the **Product Search** window.

UPC	Description	QoH	Price
<input type="checkbox"/> 023614072010	Browning 1911-22 COMP AUTO Black	0	\$549.00
<input type="checkbox"/> 076683239143	Speer 327 Federal 115 Grain Gold Dot	16	\$24.99
<input checked="" type="checkbox"/> 1123456	ZOMBIE WITH KID TARGET	106	\$1.99
<input type="checkbox"/> 112345678	ZOMBIE WITH WOMAN	62	\$1.99
<input type="checkbox"/> 123	ZOMBIE CLOWN	69	\$1.99
<input type="checkbox"/> 123345	Blue Widget	-7	\$9.99
<input type="checkbox"/> 123456789123	TEST ITEM	20	\$35.99
<input type="checkbox"/> 29465027131	Federal Field & Range 12 Ga. 2 3/4" 1	-7	\$9.99
<input type="checkbox"/> 39873336	BAD GUY TARGET	37	\$1.99
<input type="checkbox"/> 600000000000	PISTOL LANE	0	\$20.00
<input type="checkbox"/> 600000000001	PISTOL SECOND SHOOTER	0	\$20.00
<input type="checkbox"/> 600000000002	LONG GUN LANE	0	\$20.00
<input type="checkbox"/> 600000000003	LONG GUN SECOND SHOOTER	0	\$20.00
<input type="checkbox"/> 600000000004	INTRO TO HANDGUNS	0	\$75.00

2. Complete any of these procedures to limit the number of products shown:
 - Enter all or part of a product's description in the **Description** field.
 - Enter all or part of a product's UPC code number in the **UPC** field.
 - Click an **Attribute** button and one of its associated **Descriptor** buttons. (Repeat as needed to further restrict products with additional attributes and descriptors.)
 - Click the **Clear** button to remove all Attribute/Descriptor filters.
3. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Unselect All** button to deselect all products.
4. Click the **Select** button to close the **Product Search** window.

Select or Add a Firearm Customer

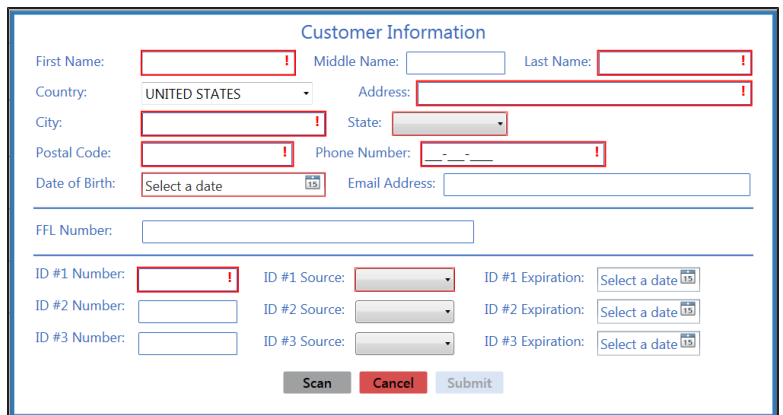
1. Navigate to the **Customer Look-up** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Firearm Sale [screen](#)** (**Select Buyer** button)
 - **Firearm Purchase [screen](#)** (**Select Seller** button)
 - **Firearm Trade [screen](#)** (**Select Buyer** button)
 - **Inbound Consignment [screen](#)** (**Select Party** button)
 - **Inbound Consignment Return [screen](#)** (**Select Party** button)
 - **Transfer In [screen](#)** (**Select Customer** button)
 - **Transfer Out [screen](#)** (**Select Customer** button)
 - **Start Customer 4473 [screen](#)** (**Select** button)
 - **New Gunsmithing Work Order Screen [screen](#)** (**Select Customer** button)
 - **New Work Order Screen [screen](#)** (**Select Customer** button)
 2. Click the indicated button to display the **Customer Look-up** window.



2. Complete the following procedures as appropriate to identify the customer:

Add a New Customer

1. Click the **Add New Customer** button to display a blank **Customer Information** window.



2. Continue with the procedure below.

Select an Existing Customer

- Complete either of these procedures to display all matching results:
 - Enter the customer's phone number in the **Phone** field.
 - Enter all or part of the customer's last name in the **Last Name** field and press the **Enter** key.
- Double-click a customer name to display the customer's **Customer Information** window.

- Continue with the procedure below.

- Enter/edit Customer information in the window as needed.

Note: Required fields and settings are displayed with red borders.

Note: If the customer has a government-issued ID, click the **Scan** button to scan it and automatically fill certain fields.

First Name	Enter the customer's first name.
Middle Name	Enter the customer's middle name.
Last Name	Enter the customer's last name.
Country	Select the country from the drop-down menu.
Address	Enter the street address.
City	Enter the city.
State	Select the state from the drop-down field.
Postal Code	Enter the postal (ZIP) code.
Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Date of Birth	Enter the customer's birth date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Email Address	Enter the entire email address.
FFL Number	Enter the customer's FFL number.
ID #1 Number	Enter the ID number.
ID #1 Source	Select the ID source from the drop-down menu.
ID #1 Expiration	Enter the ID expiration date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
ID #2 Number	Enter the ID number.
ID #2 Source	Select the ID source from the drop-down menu.

ID #2 Expiration	Enter the ID expiration date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
ID #3 Number	Enter the ID number.
ID #3 Source	Select the ID source from the drop-down menu.
ID #3 Expiration	Enter the ID expiration date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.

4. Click the **Submit** button.

Select a Firearm Vendor

1. Navigate to the **Vendor Look-up** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Transfer In screen** (**Select Dealer** button)
 - **Transfer Out screen** (**Select Dealer** button)
 - **Open Work Orders (gunsmithing) screen** (**OK** button in the vendor selection notice window)
 2. Click the indicated button to display the **Vendor Look-up** window.

Name	Primary Address	City	State
Acusport	One Hunter Place	Bellefontaine	OH
Al's Guns & Ammo			

2. Complete the following procedures as appropriate to identify the transfer agent:

Add a New Vendor

1. Click the **New** button to display a blank **Vendor Information** window.
2. Continue with the procedure below.

Select an Existing Vendor

1. If needed, enter all or part of the transfer agent's name in the **Name** field to display all matching results.
2. Double-click a transfer agent name to display the agent's **Vendor Information** window.

3. Continue with the procedure below.

3. Enter/edit Vendor information in the window as needed.

Vendor Name	Enter the vendor's name.
Address	Enter the first line of the street address.
City	Enter the city.
State	Enter the two-letter abbreviation for the state.

Zip	Enter the ZIP code.
Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Email Address	Enter the entire email address.
FFL Number	Enter the vendor's FFL number.

4. Click the **Submit** button.

Select a Transfer Agent

Note: A transfer agent is a firearm vendor that has been identified with a check mark in the vendor's **Is A Transfer Agent** checkbox prior to the current transaction.

1. Navigate to the **Transfer Agent Look-up** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Firearm Sale screen** (**Transfer Agent** button)
 - **Firearm Trade screen** (**Transfer Agent** button)
 - **Inbound Consignment Return screen** (**Transfer Agent** button)
 2. Click the indicated button to display the **Transfer Agent Look-up** window.

2. Complete the following procedures as appropriate to identify the transfer agent:

Add a New Transfer Agent

1. Click the **New** button to display a blank **Vendor Information** window.
2. Continue with the procedure below.

Select an Existing Transfer Agent

1. If needed, enter all or part of the transfer agent's name in the **Name** field to display all matching results.
2. Double-click a transfer agent name to display the agent's **Vendor Information** window.

3. Continue with the procedure below.

3. Enter/edit Vendor information in the window as needed.


Vendor Name	Enter the vendor's name.
Address	Enter the first line of the street address.

City	Enter the city.
State	Enter the two-letter abbreviation for the state.
Zip	Enter the ZIP code.
Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Email Address	Enter the entire email address.
FFL Number	Enter the vendor's FFL number.

4. Click the **Submit** button.

Select a Firearm from the Firearm Inventory Window

1. Navigate to the **Firearm Inventory** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Firearm Sale screen** (**Add Outgoing** button or a firearm's **Edit** button)
 - **Firearm Trade screen** (**Add Outgoing** button or an incoming firearm's **Edit** button)
 - **Transfer Out screen** (**Add Outgoing** button or a firearm's **Edit** button)
 - **Stolen Firearm screen** (**Add Firearms** button)
 2. Click the indicated button to display the **Firearm Inventory** window.



LOG#	Manufacturer	Model	S/N	Select
23	GLOCK	19	92	<input type="checkbox"/>
24	GLOCK	19	91	<input type="checkbox"/>
25	GLOCK	19	90	<input type="checkbox"/>
26	GLOCK	19	89	<input type="checkbox"/>
27	GLOCK	19	88	<input type="checkbox"/>
28	GLOCK	19	87	<input type="checkbox"/>
29	GLOCK	19	86	<input type="checkbox"/>
30	GLOCK	19	YT556667	<input type="checkbox"/>
31	GLOCK	31	15	<input type="checkbox"/>
32	GLOCK	31	16	<input type="checkbox"/>
33	GLOCK	31	17	<input type="checkbox"/>
34	GLOCK	31	18	<input type="checkbox"/>
35	GLOCK	31	19	<input type="checkbox"/>
36	GLOCK	31	100	<input type="checkbox"/>
39	GLOCK	31	123456H	<input type="checkbox"/>
40	GLOCK	31	123432D	<input type="checkbox"/>
41	GLOCK	31	123434AE	<input type="checkbox"/>
42	GLOCK	31	122323FA	<input type="checkbox"/>
43	GLOCK	31	TTY663	<input type="checkbox"/>
44	GLOCK	31	99UU8	<input type="checkbox"/>
45	GLOCK	31	ADD123	<input type="checkbox"/>

2. Complete one of the following procedures to select a firearm:
 - Scan the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Enter the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Locate the firearm in the list and check its **Select** checkbox.
3. Repeat steps as needed to reattempt a failed selection and/or select additional firearms.
4. Click the **Submit** button.

Describe a Firearm

1. Navigate to the **Firearm Description** window.
 1. Access one of the following locations in the **Data Center** application as appropriate:
 - **Firearm Purchase screen** (**Add Incoming** button or a firearm's **Edit** button)
 - **Firearm Trade screen** (**Add Incoming** button or an incoming firearm's **Edit** button)
 - **Transfer In screen** (**Add Transfer** button or a firearm's **Edit** button)
 - **Inbound Consignment screen** (**Add Incoming** button or a firearm's **Edit** button)
 - **Firearm Inventory Aging screen** (a firearm's **Edit** button)
 - **Firearm Inventory With Costs screen** (a firearm's **Edit** button)
 - **New Gunsmithing Work Order Screen screen** (**Add Gun** button)
 - **Receiving Details screen** (receive a firearm or a firearm's **Edit** button)
 2. Click the indicated button to display the **Firearm Description** window.

2. Enter/edit Firearm information in the window as needed.

Note: Required fields and settings are displayed with red borders. Depending on the situation, some fields may not be present.

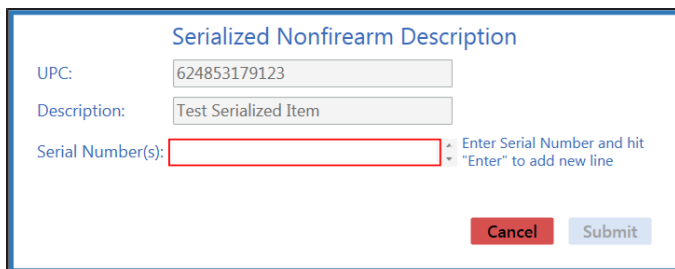
UPC	Select the firearm's UPC code from the drop-down menu.
Manufacturer	Select a manufacturer from the drop-down. If the manufacturer is not listed in the drop-down, enter the manufacturer's name in the field to record it for this firearm and add it to the drop-down for selection in the future.
Manufacturer #	Enter the manufacturer's stock order number for the firearm.
Importer	Select an importer (or "NONE" if applicable) from the drop-down. If the importer is not listed in the drop-down, enter the importer's name in the field to record it for this firearm and add it to the drop-down for selection in the future.

Model	<p>Note: Be sure to complete the Manufacturer field before selecting or entering a model: The drop-down only displays models associated with the selected manufacturer, and a manually entered model will be associated with the selected manufacturer in the future.</p> <p>Select a model from the drop-down.</p> <p>If the model is not listed in the drop-down, enter the model in the field to record it for this firearm and add it to the drop-down for selection in the future.</p>
Serial Number(s)	<p>Enter (or scan) the firearm's serial number.</p> <p>To record multiples of the same firearm, press the Enter key between entries/scans of individual serial numbers.</p>
Consignment Fee	<p>Select Fixed or Percentage to determine how the consignment fee is calculated.</p>
Amount	<p>If the selected Consignment Fee is Fixed, enter a fixed amount with no dollar sign and two decimal places (0.00) in the Amount field.</p> <p>If the selected Consignment Fee is Percentage, enter the percentage amount in the form of a decimal (.2 instead of 20%) in the Percentage field.</p>
Barrel Length	<p>Enter a numeric value (e.g., 4.48, 18.5) for the barrel length.</p>
Gauge/Caliber	<p>Enter an alpha-numeric expression (e.g., 9mm, 12GA) for the gauge/caliber.</p>
Type of Firearm	<p>Select the firearm type from the drop-down.</p> <p>Note: This selection determines which Bound Book (NFA or Non-NFA) will contain the firearm's record.</p>
Description	<p>Enter a description that summarizes the firearm's recorded specifications or provides additional information about the firearm.</p>
New/Used	<p>Select an option ("New" or "Used") from the drop-down.</p> <p>Note: Select Used for all consignments.</p>
Condition	<p>Enter a description of the firearm's condition.</p>
Minimum Amount	<p>Enter the minimum amount for which the firearm may be sold.</p>
Inventory Number	<p>The system automatically populates this field.</p>
Cost	<p>Enter the firearm's cost.</p> <p>Note: If needed, the cost can be edited in the Bound Book later.</p>
Sales Price	<p>Enter the price for the firearm.</p> <p>Note: If no price is entered, a price will have to be entered at the time of sale.</p>
Location	<p>Enter the firearm's physical location in the store/warehouse.</p>
3310-12 Firearm	<p>Check the box if the firearm should be included in 3310-12 calculations and reports.</p>

3. Click the **Submit** button.

Describe a Serialized Nonfirearm Item

1. Use onscreen controls to display the **Serialized Nonfirearm Description** window.



Serialized Nonfirearm Description

UPC: 624853179123

Description: Test Serialized Item

Serial Number(s): Enter Serial Number and hit "Enter" to add new line

Cancel Submit

2. Enter Item information in the window as needed.

Note: Required fields and settings are displayed with red borders. Depending on the situation, some fields may not be present.

UPC	Enter the product's UPC code.
Description	Enter the item description to be displayed on information screens.
Serial Number(s)	Enter (or scan) the item's serial number. To record multiples of the same item, press the Enter key between entries/scans of individual serial numbers.

3. Click the **Submit** button.

Sort and Filter Onscreen Data

Complete the following procedures as needed to adjust the arrangement and selection of data shown on a screen.

Sort a Simple Data Screen

Store	Date/Time	Title	Cashier	Total	Amount Due	Date Due
1	Tue Oct 08 2013 12:55 PM	targets	Super User	\$798.75	\$499.06	Fri Nov 08 2013
1	Fri Oct 11 2013 02:15 PM	targets	Super User	\$8.00	\$6.00	Mon Nov 11 2013

If a screen displays data in a simple table format, click a column's heading to sort the rows according to its contents:

- Click the column heading once to sort the rows in ascending (A-Z; 1-2-3; Chronological; etc.) order .
- Click the column heading again to sort the rows in descending (Z-A; 3-2-1; Reverse-Chronological; etc.) order .

Sort and Filter a Report Screen

Log #	Store	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Type Of Action	Market Value	Reserved by
4002	3	GERMAN	LUGER	ABC123	4.0000	9MM	PISTOL	\$1,495.00	
88	1	Glock	17	74	4.4800	9mm	PISTOL	\$0.00	
50	1	Glock	17	31	4.4800	9mm	PISTOL	\$0.00	
71	1	Glock	17	b100	4.4800	9mm	PISTOL	\$850.00	
72	1	Glock	17	B200	4.4800	9mm	PISTOL	\$850.00	
73	1	Glock	17	B300	4.4800	9mm	PISTOL	\$850.00	
75	1	Glock	17	B500	4.4800	9mm	PISTOL	\$850.00	
76	1	Glock	17	B600	4.4800	9mm	PISTOL	\$850.00	
77	1	Glock	17	B700	4.4800	9mm	PISTOL	\$850.00	
78	1	Glock	17	B800	4.4800	9mm	PISTOL	\$850.00	
79	1	Glock	17	B900	4.4800	9mm	PISTOL	\$850.00	
80	1	Glock	17	B1000	4.4800	9mm	PISTOL	\$850.00	

If a screen displays data in a report format, complete any of the following procedures as appropriate to sort or filter the report data:

Sort Rows According to a Column's Contents

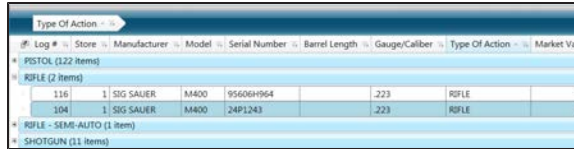
- Click the column heading once to sort the rows in ascending (A-Z; 1-2-3; Chronological; etc.) order .
- Click the column heading again to sort the rows in descending (Z-A; 3-2-1; Reverse-Chronological; etc.) order .

Group Rows According to a Column's Contents

1. Drag a column heading onto the gray bar at the top of the table to collect rows in groups.



2. Click a group's **Expand (+)** button to display the rows inside it.



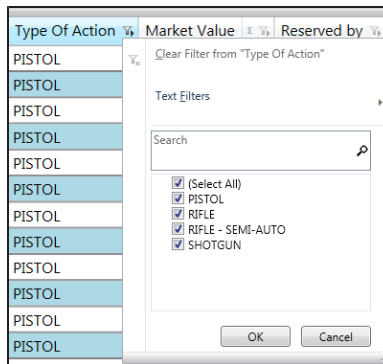
3. Click a group's **Contract (-)** button to hide the rows inside it.

Remove a Column from the Screen

Drag a column heading above the gray bar at the top of the table to remove it from the table.

Filter Data According to a Column's Contents

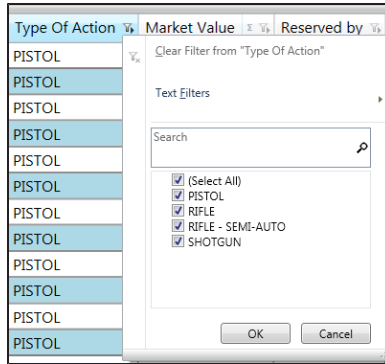
1. Click the **Filter** (funnel shape) button in the column heading to display a filter selection menu.



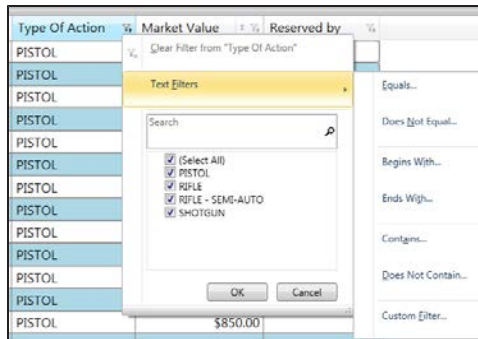
2. Complete any of these procedures to enter desired filter criteria:
 - Check the checkbox(es) for contents to be retained. (Uncheck the boxes for items to filter out.)
 - Enter one or more characters in the **Search** field to select matching checkboxes.
 3. Click the **OK** button to show filtered results.
-

Custom Filter Data According to a Column's Contents

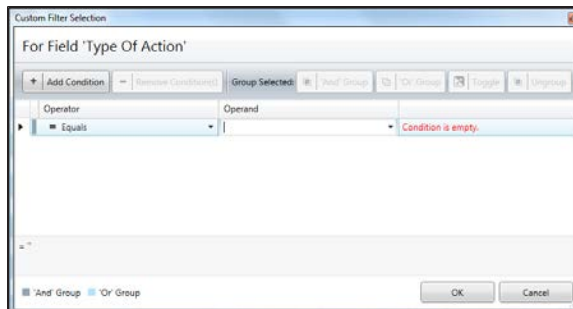
1. Click the **Filter** (funnel shape) button in the column heading to display a filter selection menu.



2. Click the **Text Filters** (or **Number Filters**) option to display a menu of filter controls.



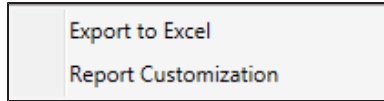
3. Click the desired filter control to display the **Custom Filter Selection** window.



4. Add **Conditions, Operators, and Operands** as desired.
5. Click the **OK** button to display the filtered list.

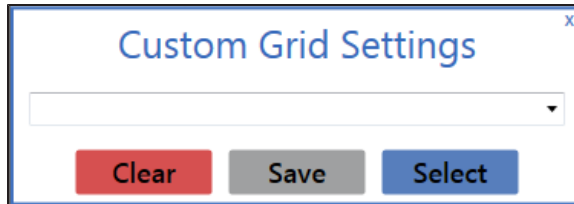
Create a Custom Report View

1. Sort and filter the report as desired.
2. Right-click on the screen to display a menu of options.



Note: On some screens, this menu may contain additional options.

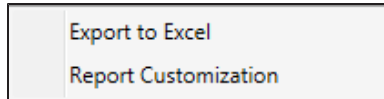
3. Click the **Report Customization** option to display the **Custom Grid Settings** window.



4. Enter a name for the custom report settings in the field.
5. Click the **Save** button to save the custom view.

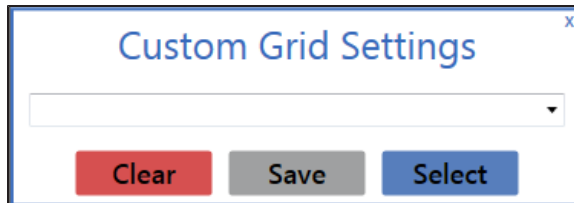
Display a Custom Report View

1. Right-click on the screen to display a menu of options.



Note: On some screens, this menu may contain additional options.

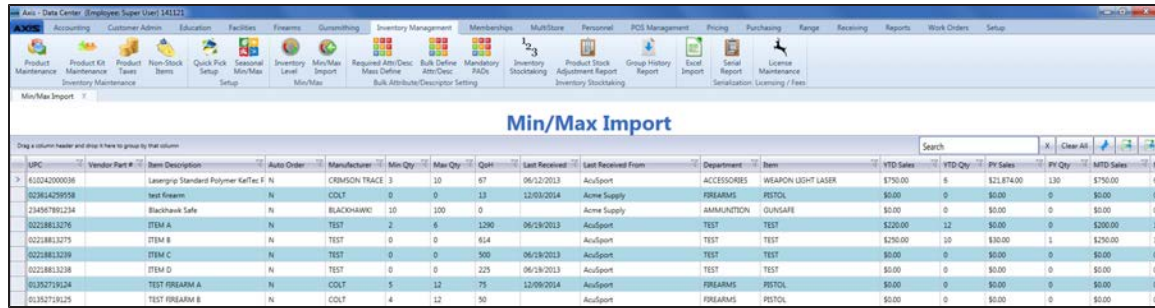
2. Click the **Report Customization** option to display the **Custom Grid Settings** window.



3. Select the desired custom view from the drop-down field.
 4. Click the **Select** button to display the report in the selected custom view.
-

Sort and Filter Reporting Screen Data

Complete the following procedures as needed to adjust the arrangement and selection of data shown on a reporting screen.

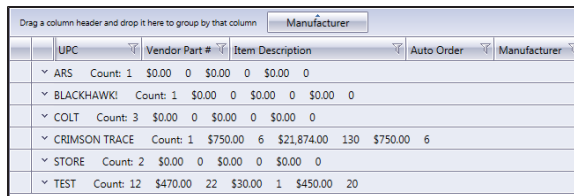


Sort Rows According to a Column's Contents

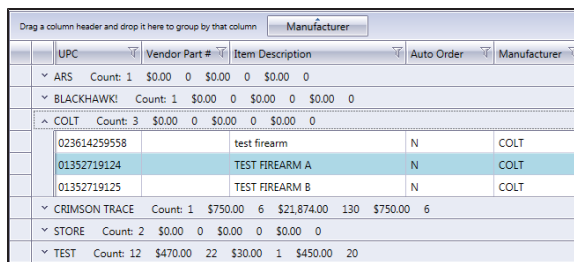
- Click the column heading once to sort the rows in ascending (A-Z; 1-2-3; Chronological; etc.) order .
- Click the column heading again to sort the rows in descending (Z-A; 3-2-1; Reverse-Chronological; etc.) order.

Group Rows According to a Column's Contents

1. Drag a column heading onto the gray bar at the top of the table to collect rows in groups.

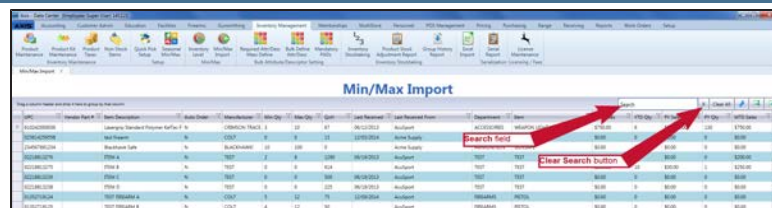


2. Click a group's **Expand** (down arrow) button to display the rows inside it.



3. Click a group's **Contract** (up arrow) button to hide the rows inside it.
4. If desired, drag the column heading back to its original position to undo the grouping.

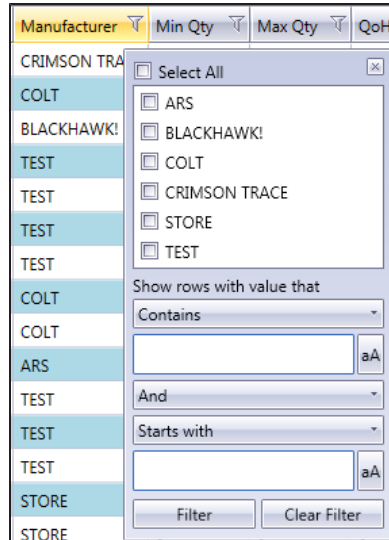
Filter Data with a Search Term



1. Enter the desired character string in the **Search** field.
2. If desired, click the **Clear Search (X)** button to undo the search.

Filter Data According to a Column's Contents

1. Click the **Filter** (funnel shape) button in the column heading to display a filter selection menu.



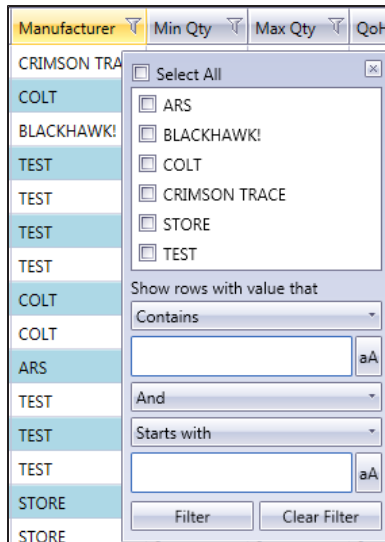
2. Complete any of these procedures to select the value(s) to be retained:

Note: If no checkboxes are checked, all values are retained in the list.

- Check a value's checkbox to select it for retention.
 - Uncheck a value's checkbox to deselect it for retention. (It will be filtered out of the list.)
 - Check the **Select All** checkbox to select all values for retention.
3. Click the **Close** button in the menu's top right corner to close it.
-

Custom Filter Data According to a Column's Contents

1. Click the **Filter** (funnel shape) button in the column heading to display a filter selection menu.



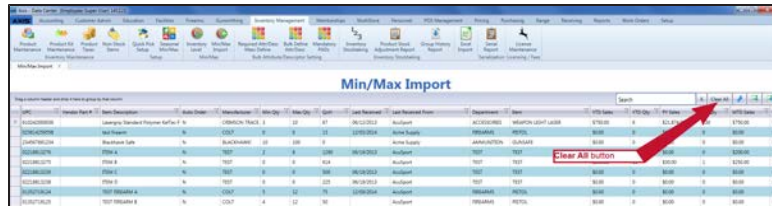
2. Complete the following procedure to define a filter criterion:
 1. Select a condition (**Is equal to**, **Starts with**, etc.) from the **Contains** drop-down.
 2. Enter the desired character string in the field below it.
 3. If needed, click the **aA** button to toggle the case match control for the entered text.
3. If desired, complete the following procedure to define a secondary filter criterion:
 1. Select a connector (**And**, **Or**) from the **And** drop-down.
 2. Select a condition (**Is equal to**, **Starts with**, etc.) from the **Startw with** drop-down.
 3. Enter the desired character string in the field below it.
 4. If needed, click the **aA** button to toggle the case match control for the entered text.
4. Click the **Filter** button to display the filtered list.
5. If desired, click the **Clear Filter** button to undo the filtering.

Toggle Column Filter Controls



Click the **Toggle Filters** button to display filter controls at the tops of the columns. (Click again to hide the controls.)

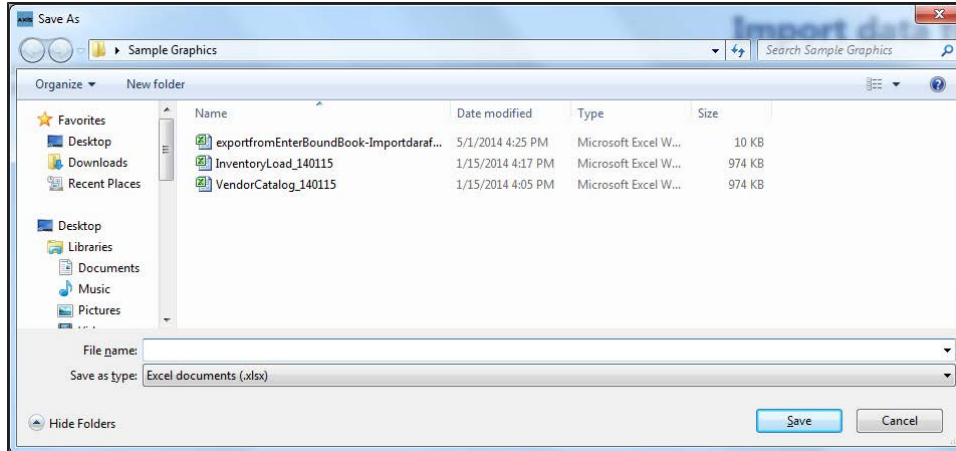
Clear all Filters



Click the **Clear All** button to undo the search.

Save and Print a Document

1. Navigate to the **Save As** window.

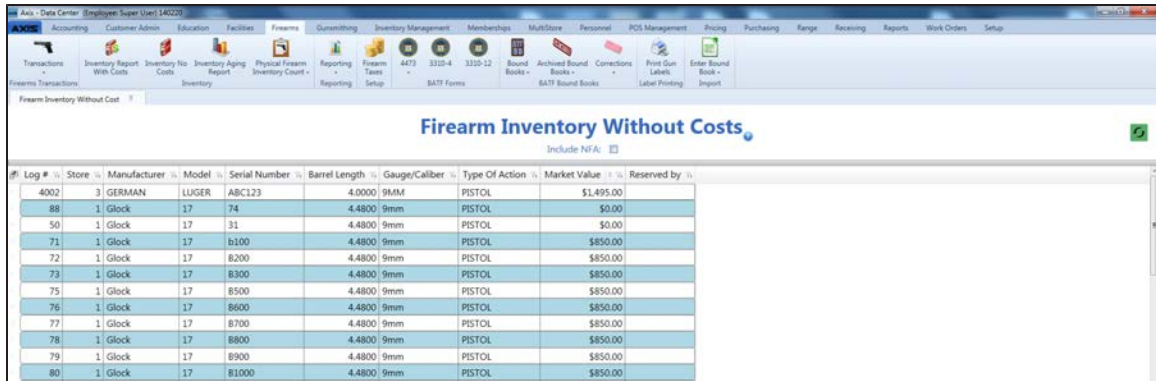


2. Browse to the desired location.
3. If needed, edit the document name in the **File name** field.
4. Click the **Save** button to save the document as an electronic file and open it for viewing.
5. Select **File > Print** from the menu bar to display print controls.
6. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
7. Click the **Print** button to print the document.
8. Select **File > Close** from the menu bar to close the document.

Export a Report to Excel

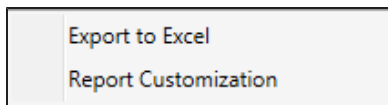
Complete the following procedure to export an onscreen report to an Excel file.

1. Navigate to a screen displaying data in a report format,



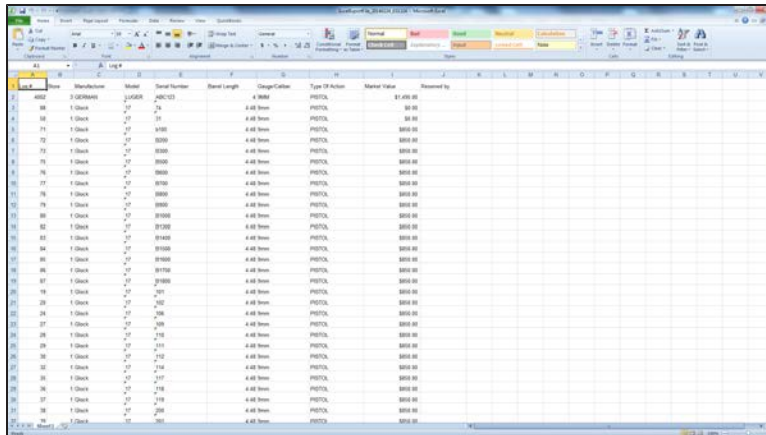
Log #	Store	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Type Of Action	Market Value	Reserved by
4002	3	GERMAN	LUGER	ABC123	4.0000	9MM	PISTOL	\$1,495.00	
88	1	Glock	17	74	4.4800	9mm	PISTOL	\$0.00	
50	1	Glock	17	31	4.4800	9mm	PISTOL	\$0.00	
71	1	Glock	17	b100	4.4800	9mm	PISTOL	\$850.00	
72	1	Glock	17	8200	4.4800	9mm	PISTOL	\$850.00	
73	1	Glock	17	8300	4.4800	9mm	PISTOL	\$850.00	
75	1	Glock	17	8500	4.4800	9mm	PISTOL	\$850.00	
76	1	Glock	17	8600	4.4800	9mm	PISTOL	\$850.00	
77	1	Glock	17	8700	4.4800	9mm	PISTOL	\$850.00	
78	1	Glock	17	8800	4.4800	9mm	PISTOL	\$850.00	
79	1	Glock	17	8900	4.4800	9mm	PISTOL	\$850.00	
80	1	Glock	17	81000	4.4800	9mm	PISTOL	\$850.00	

2. Right-click on the screen to display a menu of options.



Note: On some screens, this menu may contain additional options.

3. Click the **Export to Excel** option to open the Excel program and display the report as a spreadsheet.



Log #	Store	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Type Of Action	Market Value	Reserved by
4002	3	GERMAN	LUGER	ABC123	4.0000	9MM	PISTOL	\$1,495.00	
88	1	Glock	17	74	4.4800	9mm	PISTOL	\$0.00	
50	1	Glock	17	31	4.4800	9mm	PISTOL	\$0.00	
71	1	Glock	17	b100	4.4800	9mm	PISTOL	\$850.00	
72	1	Glock	17	8200	4.4800	9mm	PISTOL	\$850.00	
73	1	Glock	17	8300	4.4800	9mm	PISTOL	\$850.00	
75	1	Glock	17	8500	4.4800	9mm	PISTOL	\$850.00	
76	1	Glock	17	8600	4.4800	9mm	PISTOL	\$850.00	
77	1	Glock	17	8700	4.4800	9mm	PISTOL	\$850.00	
78	1	Glock	17	8800	4.4800	9mm	PISTOL	\$850.00	
79	1	Glock	17	8900	4.4800	9mm	PISTOL	\$850.00	
80	1	Glock	17	81000	4.4800	9mm	PISTOL	\$850.00	

4. Select **File > Save As** from the menu bar to display the **Save As** window.
5. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the spreadsheet as needed.

System Setup and Management

This section contains procedures to set up, use, and maintain company and store-specific information, settings, hardware, facilities, and email templates.

Company Information

Company Information includes the company's name, addresses, websites, email addresses, and contacts.

- [Manage Company Information \(see page 54\)](#)
- [Manage Company Contacts \(see page 56\)](#)

Store Information

Store Information includes the store's name, addresses, phone numbers, websites, email addresses, and store-specific settings for features such as SMTP and email communications, business days, specific time periods, fees for special services, and behaviors for the **Register** application.

- [Manage Store Information \(see page 59\)](#)

Miscellaneous Store Information

Miscellaneous Store Information includes settings for expiration and payment due dates, online features and listings, specialized/departmental email addresses, and the appearance of the **Register** application.

- [Manage Miscellaneous Store Information \(see page 63\)](#)

Credit Card Processing Information

Credit card processing information includes the internet settings and locations utilized to allow secure communication between the system and the credit card processing service.

- [Manage Credit Card Processor Credentials \(see page 65\)](#)

Email Templates

Whether communicating with a single vendor or an entire database of customers, email templates help create a consistent message.

- [Manage Email Templates \(see page 67\)](#)

Federal Firearm License (FFL)

A Federal Firearm License (FFL) is required to acquire and dispose of firearms, track firearm transactions, pull related reports, and generate reporting forms.

- [Manage FFL Information \(see page 70\)](#)

Firearm Waiting Periods

Firearm Waiting Periods define the amount of time (expressed in business days or hours) that must pass between the purchase of a firearm and its disposition to the customer. Different waiting periods may be established for different types of firearms.

- [Set Up and Update a Firearm Waiting Period \(see page 74\)](#)

Firearm UPCs

Firearm UPCs allow firearms to be more efficiently categorized and tracked within the system.

- [Manage Firearm UPCs \(see page 72\)](#)

Gun Show Information

Gun Show Information includes the show's name, abbreviation, location, and mailing address. A gun show that has been set up in the system may be selected from a drop-down menu when recording a firearm transaction that occurred at the show. (If the appropriate gun show has not been set up, it will not be available during this process.)

- [Manage Gun Show Information \(see page 76\)](#)

Weighted Suggestions

Weighted Suggestions determine how the system utilizes past sales data to calculate suggested min/max values.

- [Manage Weighted Suggestions \(see page 78\)](#)

Vendor Product Detail Windows

The Vendor Product Detail windows appear during the receiving process as a method for establishing an item's vendor product number.

- [Manage the Vendor Product Detail Windows \(see page 81\)](#)

Hardware

System hardware components (computers, POS machines, tablets, printers, etc.) must be set up to communicate with one another and configured to operate as desired.

- [Manage Physical Machines \(see page 83\)](#)
- [Manage Label Printers \(see page 85\)](#)

ID Types

ID Types include the variety of credentials (drivers licenses, military IDs, carry permits, etc.) with which a customer's identity may be verified.

- [Manage Identification Types \(see page 87\)](#)

Loss/Gain Reasons

Loss/Gain Reasons provide standard, selectable options for categorizing discrepancies discovered during a physical inventory count.

- [Manage Loss/Gain \(Stock Discrepancy\) Reasons \(see page 89\)](#)

Mandatory Attributes and Descriptors

An Attribute is a broad category by which products may be identified and sorted. A Mandatory Attribute is a required attribute that must be defined for a given product. A Descriptor is a specific value within an Attribute category that can be assigned to similar products to distinguish them from others.

- [Manage Mandatory Attributes \(see page 91\)](#)

Point of Sale Options

POS options include the definition of unique tender types, the automation of transaction payment processes, the requirement of customer selection to start a transaction, and the inclusion of the customer's phone number on receipts.

- [Manage POS Options \(see page 93\)](#)

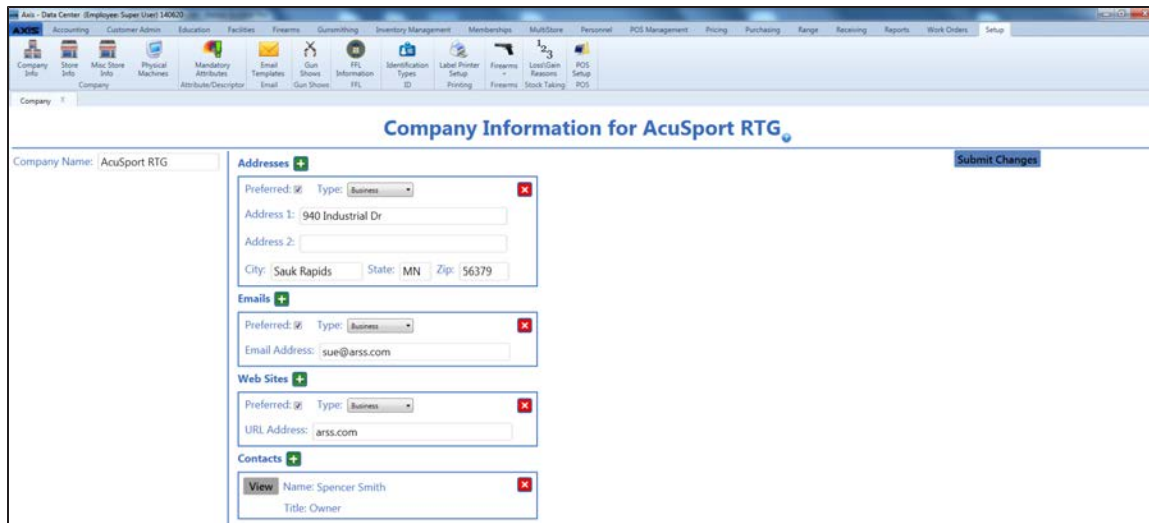
Manage Company Information

1. Navigate to the **Company Information for** screen.

1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Setup > Company Info** from the main menu to display the **Company Information for** screen.



2. Enter/edit Company information on the screen.

Note: Required fields and settings are displayed with red borders.

Company Name	Enter the name of the company.
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.
	Preferred If this address record is the preferred method of contact, check the checkbox.
	Type Select the appropriate value from the drop-down menu.
	Address 1 Enter the first line of the street address.
	Address 2 Enter the second line of the street address (if applicable).
	City Enter the city.
	State Enter the two-letter abbreviation for the state.
	Zip Enter the ZIP code.
Emails	If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.

	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.
Web Sites		If a website record is not needed, click its Close (red X) button to close it. If an additional website record is needed, click the Add (green +) button to open it.
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.
Contacts		<p>If a contact record is not needed, click its Close (red X) button to delete it. If an additional contact record is needed, click the Add (green +) button to open a blank Contact Information window.</p> <p>To view or edit an existing contact record, click the record's View button to display the contact's Contact Information window.</p> <p>Note: Refer to Manage Company Contacts (see page 56) for more information.</p>

3. Click the **Submit Changes** button to display a “Record saved” confirmation message below the button.
4. Click the tab's **Close** button to close the screen.

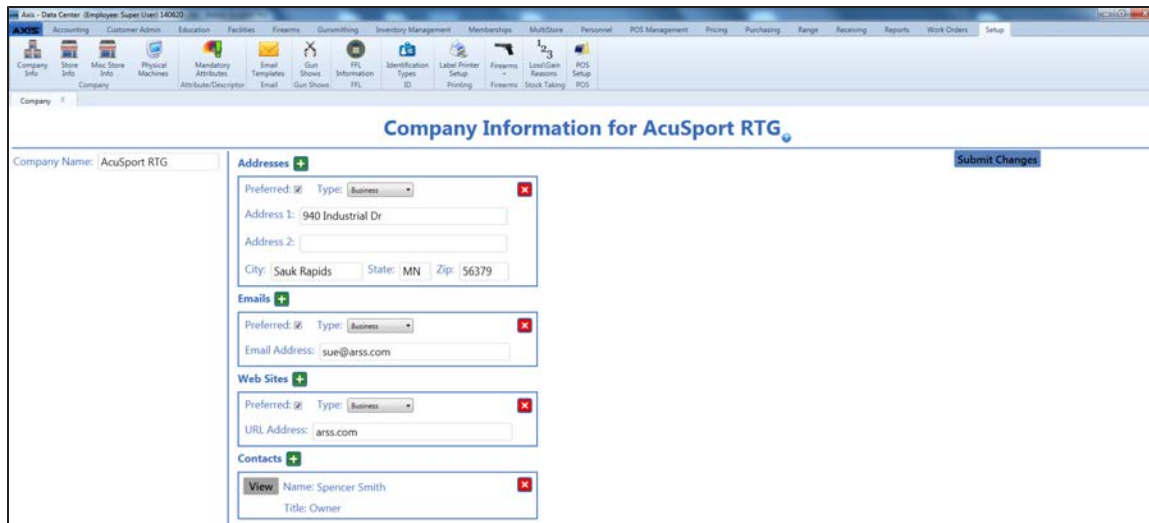
Manage Company Contacts

1. Navigate to the **Company Information for** screen.

1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.

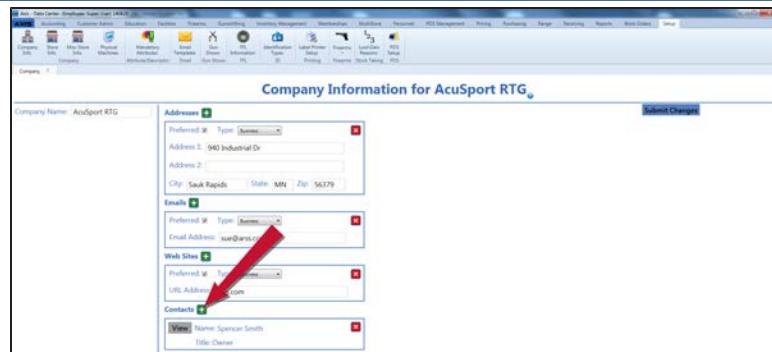


2. Select **Setup > Company Info** from the main menu to display the **Company Information for** screen.



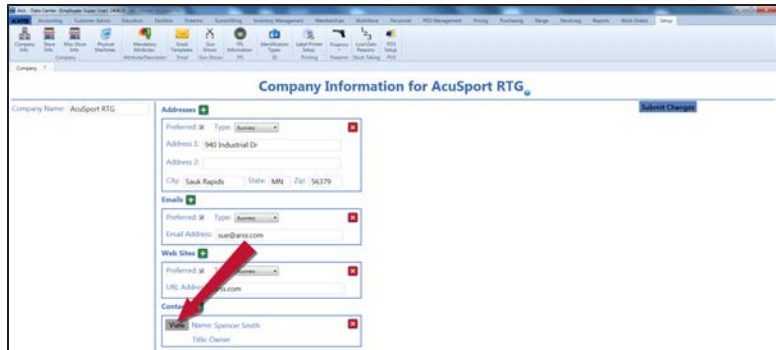
2. Complete the following procedures as needed to manage company contacts:

Add a Contact



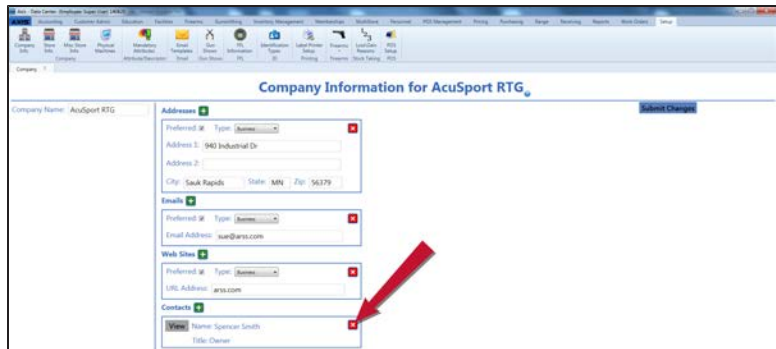
1. Click the **Add** (green +) button beside the **Contacts** heading to display the **Contact Information** window.
2. Continue with the procedure below.

Edit a Contact



1. Click a contact's **View** button to display the contact's **Contact Information** window.
2. Continue with the procedure below.

Delete a Contact



1. Click a contact's **Close** (red **X**) button to delete it.
2. Click the **Submit Changes** button to display a "Record saved" confirmation message below the button.

3. Enter/edit Company Contact information in the window.

Note: Required fields and settings are displayed with red borders.

First	Enter the contact's first name.
Last	Enter the contact's last name.
Title	Enter the contact's title.
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.
	Preferred If this address record is the preferred method of contact, check the checkbox.
	Type Select the appropriate value from the drop-down menu.
	Address 1 Enter the first line of the street address.
	Address 2 Enter the second line of the street address (if applicable).
	City Enter the city.
	State Enter the two-letter abbreviation for the state.
	Zip Enter the ZIP code.

Phones	If a phone record is not needed, click its Close (red X) button to close it. If an additional phone record is needed, click the Add (green +) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.

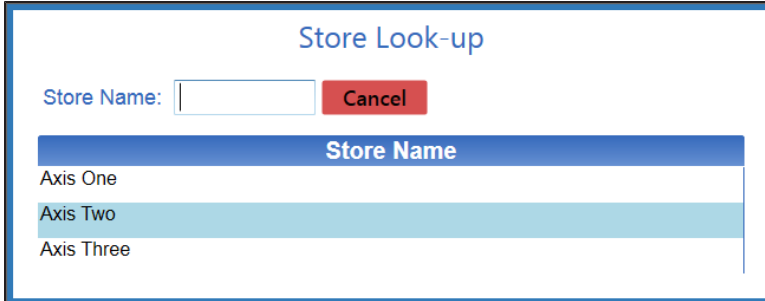
4. Click the **Save** button to close the window and display the contact on the **Company Information for** screen.
5. Click the **Submit Changes** button to display a “Record saved” confirmation message below the button.
6. Click the tab's **Close** button to close the screen.

Manage Store Information

1. Navigate to a store's **Store Information** for screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.

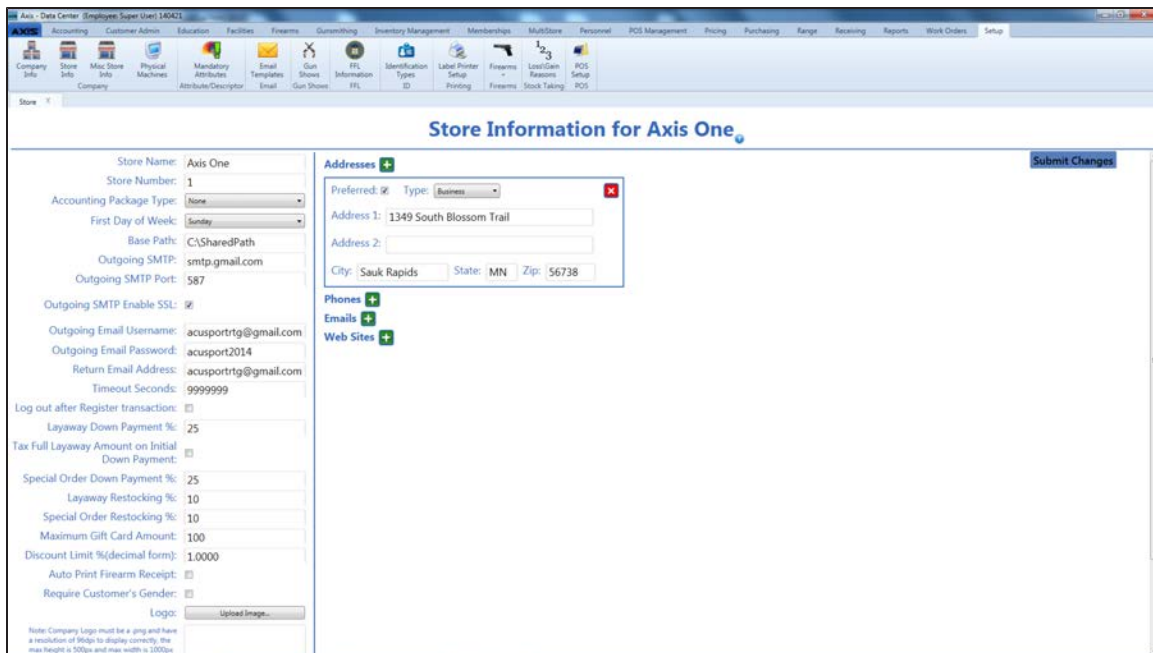


2. Select **Setup > Store Info** from the main menu to display the **Store Look-up** window.



3. Double-click a store's name to display its **Store Information** for screen.

Note: If needed, enter all or part of a store's name in the **Store Name** field to restrict the stores shown in the list.



2. Enter/edit Store information on the screen.

Note: Required fields and settings are displayed with red borders.

Store Name	Enter the store name.
Store Number	Enter the store number. (Changing the store number is not recommended.)

First Day of Week	Select the first day of the business week from the drop-down menu.
Base Path	
Outgoing SMTP	If using the AXIS RMS to send emails, enter the outgoing SMTP.
Outgoing SMTP Port	If using the AXIS RMS to send emails, enter the outgoing SMTP port.
Outgoing SMTP Enable SSL	If using the AXIS RMS to send emails, check the checkbox.
Outgoing Email Username	If using the AXIS RMS to send emails, enter the outgoing email username.
Outgoing Email Password	If using the AXIS RMS to send emails, enter the outgoing email password.
Return Email Address	If using the AXIS RMS to send emails, enter the return email address.
Timeout Seconds	Enter the number of seconds the Register can be idle before it automatically logs out the user.
Log out after Register transaction	If the Register should automatically log out the user after a transaction and require the user to log in again before proceeding, check the checkbox.
Layaway Down Payment %	Enter the percentage of a layaway's price to be required as a minimum down payment at the Register.
Tax Full Layaway Amount on Initial Down Payment	If the entire tax on a layaway should be collected with the down payment at the Register, check the checkbox.
Special Order Down Payment %	Enter the percentage of a special order's price to be required as a minimum down payment at the Register.
Layaway Restocking %	If a restocking fee is charged for a canceled layaway, enter the percentage of a layaway's price to be charged as a fee.
Special Order Restocking %	If a restocking fee is charged for a canceled special order, enter the percentage of a special order's price to be charged as a fee.
Maximum Gift Card Amount	Enter the maximum amount that can be stored on a gift card. (This allows for store policy to prevent the purchase of large gift cards.)
Discount Limit	Enter the maximum percentage (in decimal format) by which an item's price may be reduced without store manager approval.
Auto Print Firearm Receipt	If firearm receipts are to be printed automatically, check the checkbox.
Require Customer's Gender	If a customer's gender must be recorded at the Register, check the checkbox.

Logo	<p>Complete the following procedure to replace the logo on the Register and Data Center main screens with a new image:</p> <p>Note: The new image must be a .png format file stored on the server. The image must have a resolution of 96 dpi, a maximum height of 500 px, and a maximum width of 1000 px.</p> <ol style="list-style-type: none"> 1. Click the Upload Image button to display an Open window. 2. Browse to the location where the image file is located. 3. Double-click the file to place it in the image field.
Addresses	<p>If an address record is not needed, click its Close (red X) button to close it.</p> <p>If an additional address record is needed, click the Add (green +) button to open it.</p>
	<p>Preferred If this address record is the preferred method of contact, check the checkbox.</p>
	<p>Type Select the appropriate value from the drop-down menu.</p>
	<p>Address 1 Enter the first line of the street address.</p>
	<p>Address 2 Enter the second line of the street address (if applicable).</p>
	<p>City Enter the city.</p>
	<p>State Enter the two-letter abbreviation for the state.</p>
	<p>Zip Enter the ZIP code.</p>
Phones	<p>If a phone record is not needed, click its Close (red X) button to close it.</p> <p>If an additional phone record is needed, click the Add (green +) button to open it.</p>
	<p>Preferred If this phone record is the preferred method of contact, check the checkbox.</p>
	<p>Type Select the appropriate value from the drop-down menu.</p>
	<p>Voice If this phone number can receive voice calls, check the checkbox.</p>
	<p>Text If this phone number can receive text messages, check the checkbox.</p>
	<p>Phone Number Enter the entire (xxx-xxx-xxxx) phone number.</p>
Emails	<p>If an email record is not needed, click its Close (red X) button to close it.</p> <p>If an additional email record is needed, click the Add (green +) button to open it.</p>
	<p>Preferred If this email record is the preferred method of contact, check the checkbox.</p>
	<p>Type Select the appropriate value from the drop-down menu.</p>

	Email Address	Enter the entire email address.
Web Sites		If a website record is not needed, click its Close (red X) button to close it. If an additional website record is needed, click the Add (green +) button to open it.
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.

3. Click the **Submit Changes** button to display a “Record saved” confirmation message below the button.
4. Click the tab's **Close** button to close the screen.

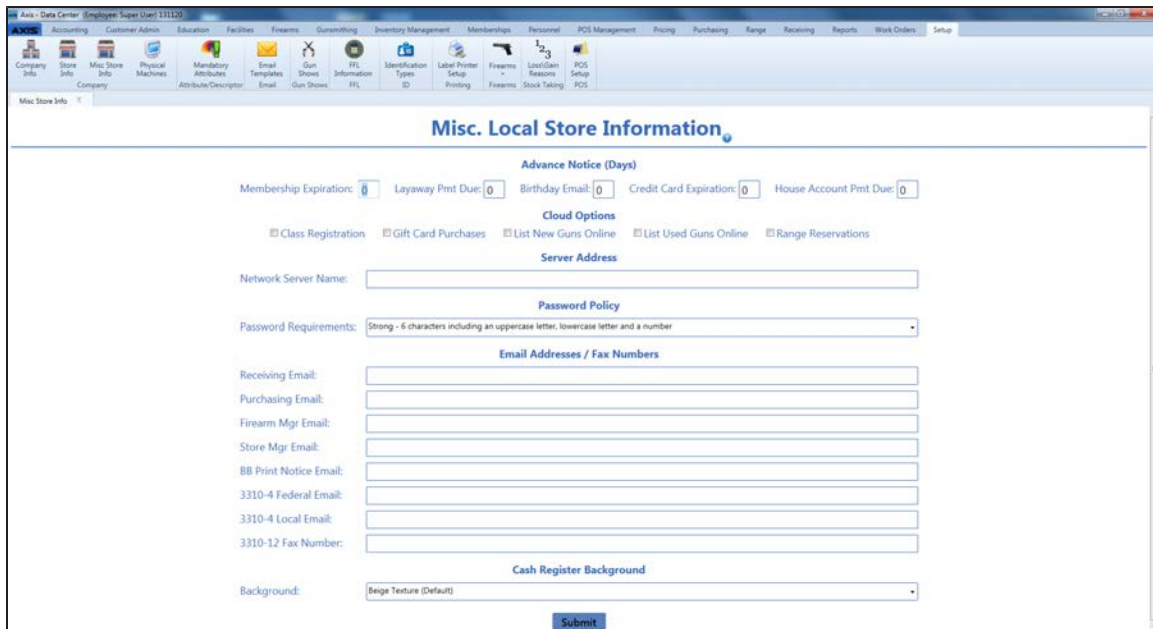
Manage Miscellaneous Store Information

1. Navigate to the **Misc Local Store Information** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Misc Store Info** from the main menu to display the **Misc Local Store Information** screen.



2. Enter/edit Miscellaneous Store information on the screen.

Note: Required fields and settings are displayed with red borders. Some fields are placeholders for future functions such as online/cloud options.

Membership Expiration	Enter the number of days before a membership expires to send a notice.
Layaway Pmt Due	Enter the number of days before a layaway payment comes due to send a notice.
Birthday Email	Enter the number of days before a birthday to send an email.
Credit Card Expiration	Enter the number of days before a credit card expires to send a notice.
House Account Pmt Due	Enter the number of days before a house account payment comes due to send a notice.
Class Registration	If class registrations can be completed via the internet, check the checkbox.
Gift Card Purchases	If gift cards can be redeemed via the internet, check the checkbox.
List New Guns Online	If new firearm inventory can be viewed via the internet, check the checkbox.
List Used Guns Online	If used firearm inventory can be viewed via the internet, check the checkbox.

Range Reservations	If range reservations can be made(/requested) via the internet, check the checkbox.
Network Server Name	Enter the complete name (including address) of the network server.
Password Requirements	Select a password requirement option from the drop-down menu.
Receiving Email	Enter the email address for the receiving department.
Purchasing Email	Enter the email address for the purchasing department.
Firearm Mgr Email	Enter the email address for the firearm department manager.
Store Mgr Email	Enter the email address for the store manager.
BB Print Notice Email	Enter the email address to which Bound Books are sent.
3310-4 Federal Email	Enter the email address to which Federal 3310-4 forms are sent.
3310-4 Local Email	Enter the email address to which Local 3310-4 forms are sent.
3310-12 Fax Number	Enter the fax number to which 3310-12 forms are sent.
Background	Select a background option from the drop-down menu.

3. Click the **Submit** button to display an update confirmation window.
4. Click the **OK** button to close the confirmation window.

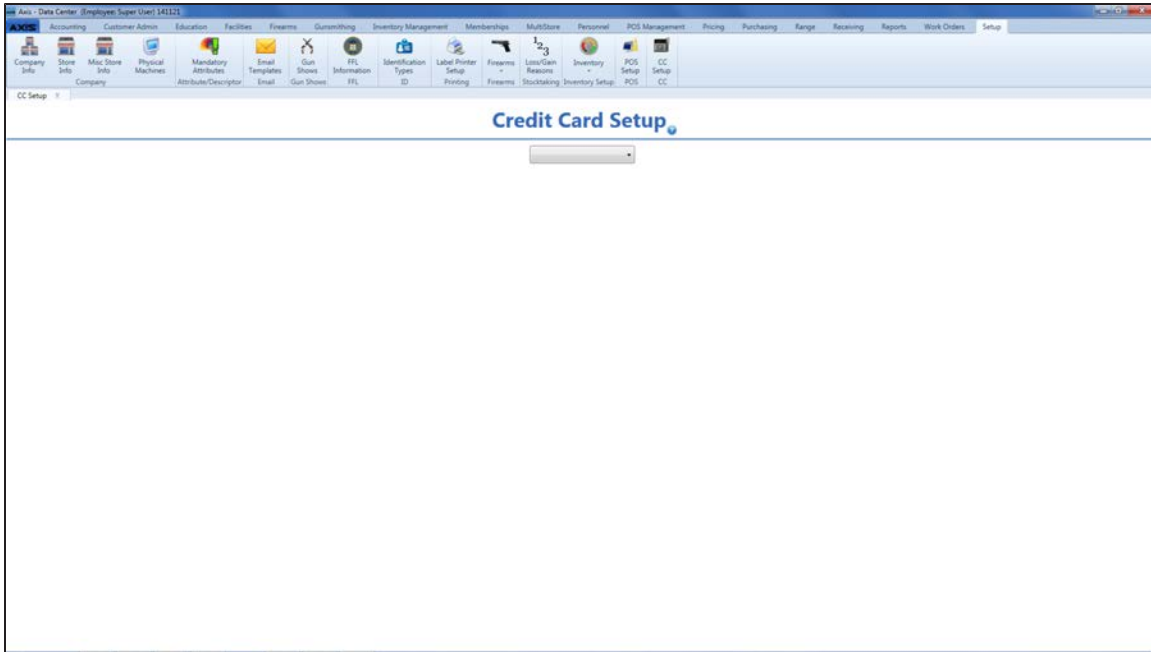
Manage Credit Card Processor Credentials

1. Navigate to the **Credit Card Setup** screen.

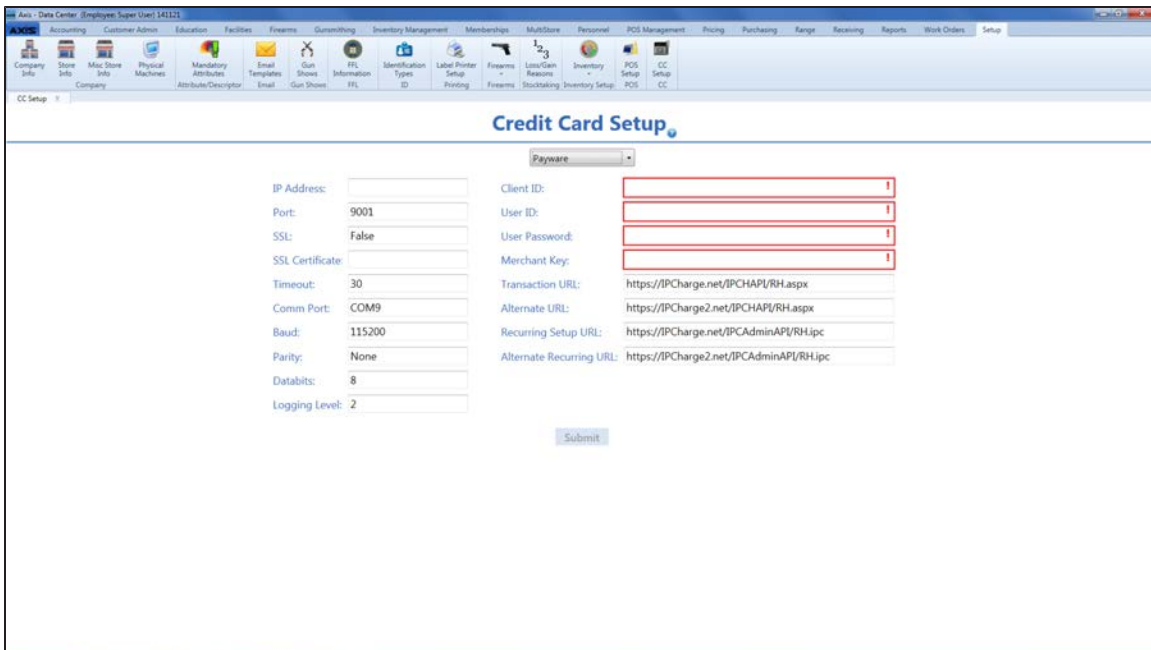
1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Setup > CC Setup** from the main menu to display the **Credit Card Setup** screen.



2. Select the appropriate provider (Payware) from the drop-down menu to display a list of data fields.



3. Enter/edit provider information in the window.

Note: Required fields and settings are displayed with red borders. Default settings are provided below.

IPAddress	
Port	9001
SSL	False
SSLCertificate	
Timeout	30
Comm Port	COM9
Baud	115200
Parity	None
Databits	8
Logging Level	2
Client ID	
User ID	
User Password	
Merchant Key	
Transaction URL	https://IPCharge.net/IPCHAPI/RH.aspx
Alternate URL	https://IPCharge2.net/IPCHAPI/RH.aspx
Recurring Setup URL	https://IPCharge.net/IPCAdminAPI/RH.ipc
Alternate Recurring URL	https://IPCharge2.net/IPCAdminAPI/RH.ipc

Note: The **Recurring Setup URL** and **Alternate Recurring URL** are used to set up a customer, set up a contract, and update a customer or contract.

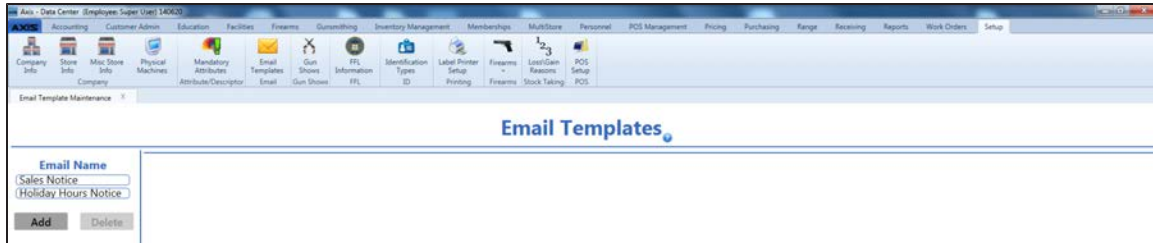
4. Complete the **Client ID**, **User ID**, **User Password**, and **Merchant Key** fields.
5. Click the **Submit** button.

Manage Email Templates

1. Navigate to the **Email Templates** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.

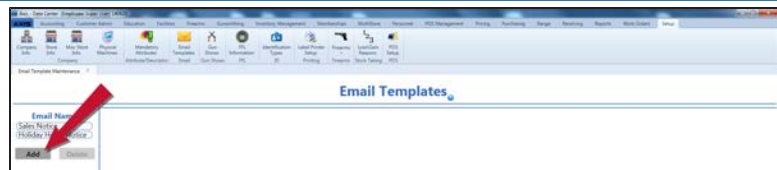


2. Select **Setup > Email Templates** from the main menu to display the **Email Templates** screen.

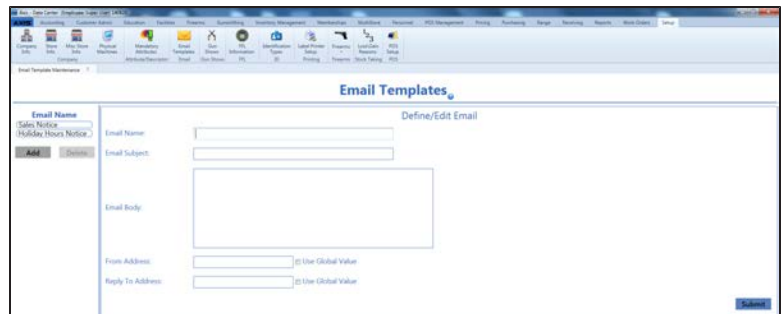


2. Complete the following procedures as needed to manage email templates:

Set Up an Email Template

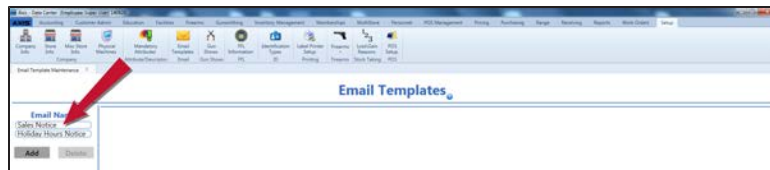


1. Click the **Add** button to display the **Define/Edit Email** section.

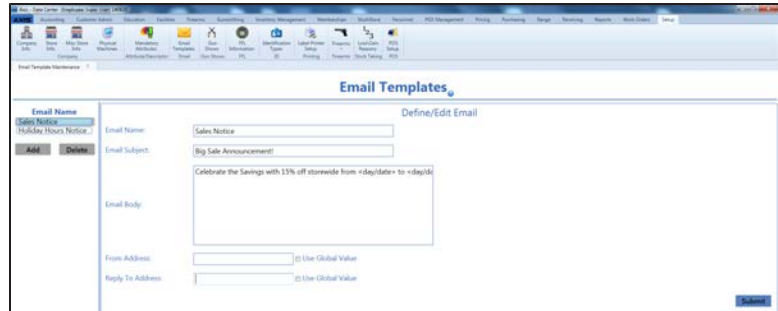


2. Continue with the procedure below.

Edit an Email Template

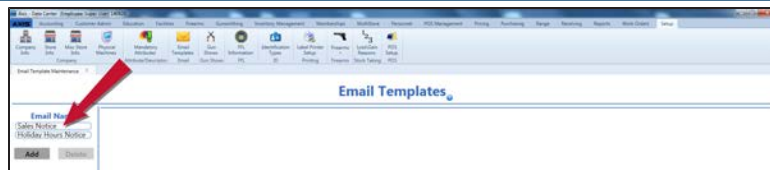


1. Click an email template's name in the **Email Name** list to display its **Define/Edit Email** section.

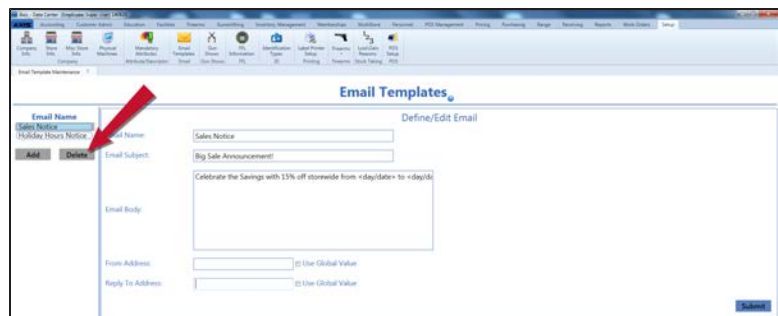


2. Continue with the procedure below.

Delete an Email Template



1. Click an email template's name in the **Email Name** list to display its **Define/Edit Email** section.



2. Click the **Delete** button to remove the email template from the **Email Name** list.
3. Click the tab's **Close** button to close the screen.

3. Enter/edit Email Template information on the screen.

Email Name	Enter the name for this template.
Email Subject	Enter the subject line for this email.
Email Body	Enter the text (body) for this email.
From Address	Enter the From address for this email. (If the associated Use Global Value checkbox is checked, this field may be left blank.)

Use Global Value	Check this checkbox to use the default global value as the From Address . (The default value is the address recorded in the Outgoing Email Username field on the Store Information for screen. Refer to Manage Store Information (see page 59) for more information.)
Reply To Address	Enter the Reply To address for this email. (If the associated Use Global Value checkbox is checked, this field may be left blank.)
Use Global Value	Check this checkbox to use the default global value as the Reply To Address . (The default value is the address recorded in the Return Email Address field on the Store Information for screen. Refer to Manage Store Information (see page 59) for more information.)

4. Click the **Submit** button to add/update the email template on the **Email Name** list.
5. Click the tab's **Close** button to close the screen.

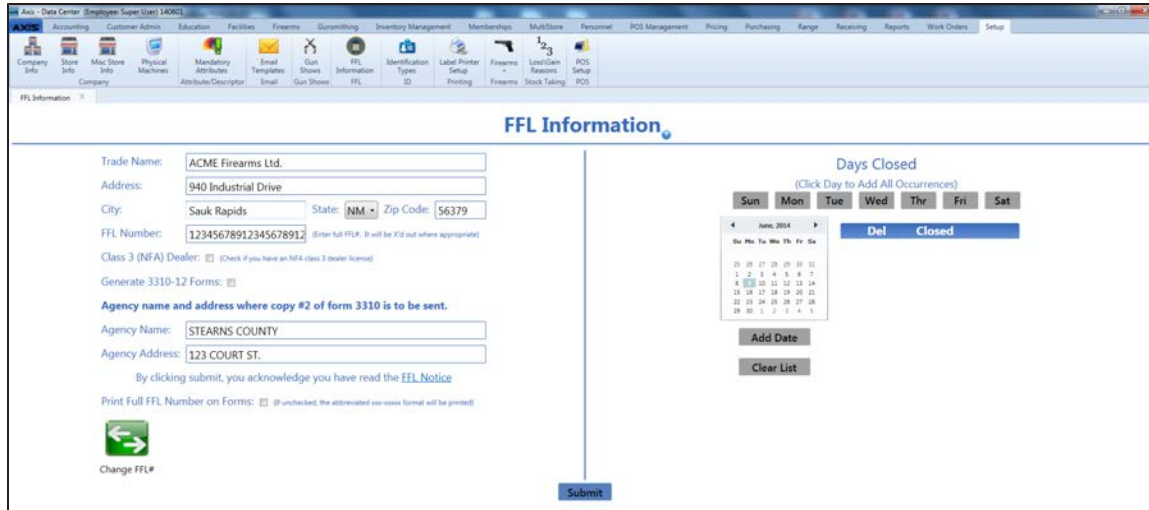
Manage FFL Information

1. Navigate to the **FFL Information** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > FFL Information** from the main menu to display the **FFL Information** screen.



2. Enter/edit FFL information on the screen.

Trade Name	Enter the trade name shown on the FFL.
Address	Enter the street address shown on the FFL.
City	Enter the city shown on the FFL.
State	Select the state shown on the FFL from the drop-down.
Zip Code	Enter the ZIP code shown on the FFL.
FFL Number	Enter the entire the FFL number. Note: The number will be hidden where appropriate.
Class 3 (NFA) Dealer	Check the checkbox if the store is licensed to deal in class 3 (NFA) firearms.
Generate 3310-12 Forms	Check the checkbox to activate 3310-12 form controls and procedures.
Agency Name	Enter the name of the state/local agency to which completed 3310 forms will be sent.
Agency Address	Enter the address of the state/local agency to which completed 3310 forms will be sent.
Print Full FFL Number on Forms	Check the checkbox to print the entire FFL number on forms. Note: If the box is not checked, an abbreviated version of the number will be used.

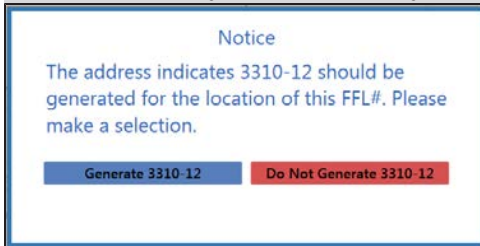
3. Complete the following procedures to identify days and dates on which the store will be closed:

- Click a weekday button to add all corresponding dates to the **Days Closed** list.
- [Select a Date \(see page 24\)](#) on the calendar and click the **Add Date** button to add the date to the

Days Closed list.

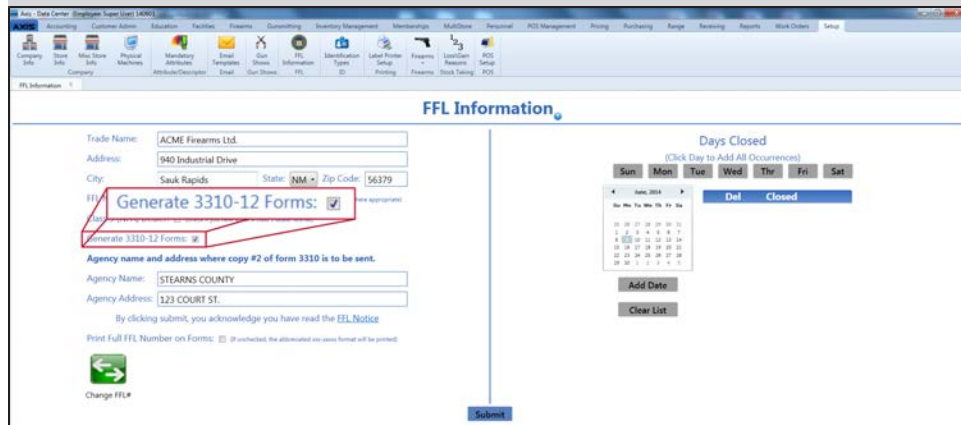
- Click a closed date's **Delete** (red X) button to remove the date from the list.
 - Click the **Clear List** button to remove all dates from the **Days Closed** list.
4. Click the **Submit** button to display an update confirmation window.

Note: If the **Generate 3310-12 Forms** checkbox is not checked and the **State** field indicates **CA, AZ, TX, or NM**, the system will display an error message window.

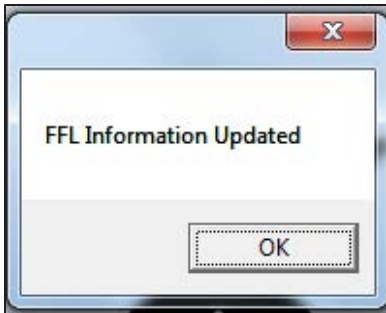


Complete either of the following as appropriate to close the window:

- Click the **Generate 3310-12** button to close the window and display the checked **Generate 3310-12 Forms** checkbox on the **FFL Information** screen.



- Click the **Do Not Generate 3310-12** button to close the window and let the system operate without the new 3310 functionality.



5. Click the **OK** button to close the confirmation window.

Manage Firearm UPCs

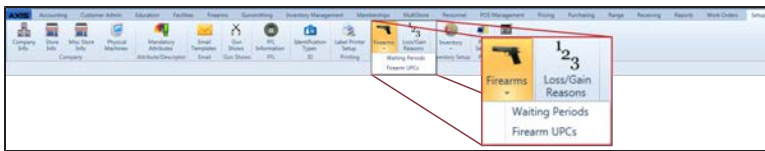
Complete the following procedure to create and maintain a Firearm UPC.

Note: A Firearm UPC can be used to identify a type of firearm (i.e., a used handgun) that does not have an existing UPC. A Firearm UPC can be selected from the **UPC** drop-down in the following firearm-specific locations:

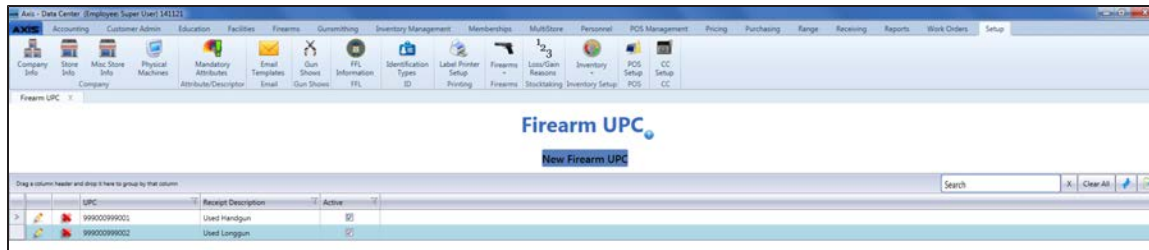
- **Firearm Description** window
- **Bound Book** screens
- **Information For Log #** window
- **Excel Import** screen
- **Firearm Inventory With Costs** screen

1. Navigate to the **Firearm UPC** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Firearms > Firearm UPCs** from the main menu to display the **Firearm UPC** screen.



2. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as needed.

3. Complete the following procedures as needed to manage firearm UPCs:

Add a Firearm UPC

1. Click the **New Firearm UPC** button to display a UPC entry window.
2. Enter/scan an 18-character alphanumeric UPC in the field.
3. Click the **Submit** button.
4. The system checks to see if the UPC already exists in the database:
 - If the UPC is in the database, the system adds it to the list on the **Firearm UPC** screen.
 - If the UPC is not in the database, the system displays the **Product Edit** window.

Note: The **UPC** field will be populated with the entered UPC and the **Is Firearm** checkbox will be checked.

Complete the window's sections to define the UPC.

Edit a Firearm UPC

1. Click a UPC's **Edit** button to display the UPC's **Product Edit** window.
 2. Complete the window's sections to define the UPC.
-

Deactivate (/Reactivate) a Firearm UPC

Complete the following procedures as needed to manage the Firearm UPC's active status:

- To deactivate the Firearm UPC: Uncheck the UPC's **Active** checkbox to remove it from **UPC** drop-down fields.
 - To reactivate the Firearm UPC: Check the UPC's **Active** checkbox to reinstate it in **UPC** drop-down fields.:
-

Delete a Firearm UPC

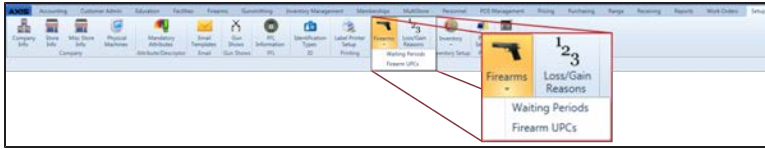
Click a UPC's **Delete** button to remove the UPC from the list on the **Firearm UPC** screen.

Note: Deleting a UPC from this screen will not delete the UPC's Product Maintenance record.

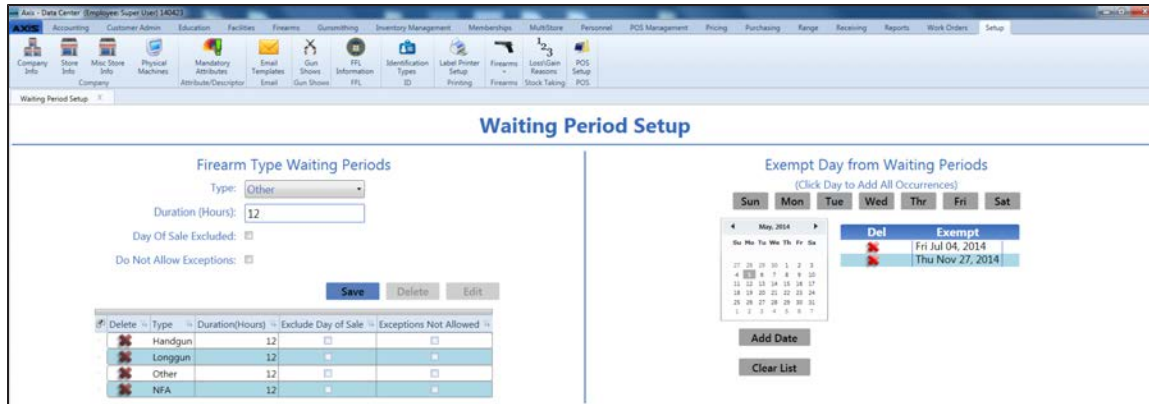
Set Up and Update a Firearm Waiting Period

1. Navigate to the **Waiting Period Setup** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Firearms > Waiting Periods** from the main menu to display the **Waiting Period Setup** screen.



2. Complete the following procedures as appropriate to manage firearm waiting periods:

Create a Firearm Waiting Period

1. Select the firearm type from the **Type** drop-down field.

Note: If a waiting period has already been set up for the selected firearm type, the new waiting period will take the place of the existing period.

2. Continue with the procedure below.

Edit a Firearm Waiting Period

1. Click a waiting period in the list to select it.
2. Click the **Edit** button to display the waiting period's information on the **Waiting Period Setup** screen.
3. Continue with the procedure below.

Delete a Firearm Waiting Period

Click a waiting period's **Delete** button to remove it from the list.

3. Enter/edit Firearm Waiting Period information on the screen.

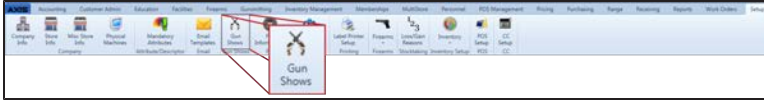
Type	Select the firearm type from the drop-down field. Note: If a waiting period has already been set up for the selected firearm type, the new waiting period will take the place of the existing period.
Duration	Enter the waiting period in hours in the field.

Day Of Sale Excluded	If the waiting period does not start until the day after a transaction, check the checkbox.
Do Not Allow Exceptions	If exceptions to the waiting period are not allowed, check the checkbox.

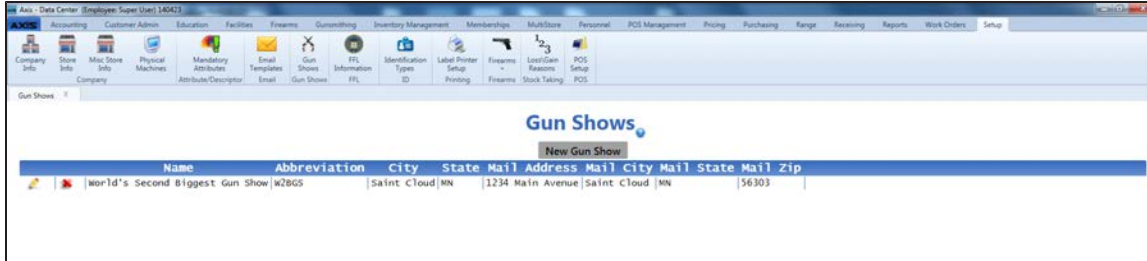
4. Click the **Save** button to add/update the waiting period on the list.
5. Complete the following procedures to identify days and dates that will not be included in waiting periods:
 - Click a weekday button to add all corresponding dates to the **Exempt Day from Waiting Periods** list.
 - [Select a Date \(see page 24\)](#) on the calendar and click the **Add Date** button to add the date to the **Exempt Day from Waiting Periods** list.
 - Click an exempt date's **Delete** (red **X**) button to remove the date from the list.
 - Click the **Clear List** button to remove all dates from the **Exempt Day from Waiting Periods** list.
6. Click the tab's **Close** button to close the screen.

Manage Gun Show Information

1. Navigate to the **Gun Shows** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Setup > Gun Shows** from the main menu to display the **Gun Shows** screen.



2. Complete the following procedures as appropriate to manage Gun Show information:

Add a Gun Show



1. Click the **New Gun Show** button to display the **Define/Edit Gun Show** window.

Define/Edit Gun Show

Gun Show Name:

Abbreviation:

City:

State:

Mailing Address

Address:

City:

State:

Zip Code:

2. Continue with the procedure below.

Edit a Gun Show



1. Click a gun show's **Edit** button to display its **Define/Edit Gun Show** window.

Define/Edit Gun Show

Gun Show Name:

Abbreviation:

City:

State:

Mailing Address

Address:

City:

State:

Zip Code:

2. Continue with the procedure below.

Delete a Gun Show



Click a gun show's **Delete** button to remove the gun show from the list on the **Gun Shows** screen.

3. Enter/edit Gun Show information in the window.

Note: Required fields and settings are displayed with red borders.

Gun Show Name	Enter the gun show's name. (If the gun show is selected during a firearm sale at a gun show, the Gun Show Name will appear in the Bound Book.)	
Abbreviation	Enter an abbreviated version of the Gun Show Name to appear in lists and drop-down menus.	
City	Enter the gun show location's city.	
State	Select the gun show location's state from the drop-down menu.	
Mailing Address		
	Address	Enter the gun show mailing address's street address
	City	Enter the gun show mailing address's city.
	State	Select the gun show mailing address's state from the drop-down menu.
	Zip Code	Enter the gun show mailing address's ZIP code.

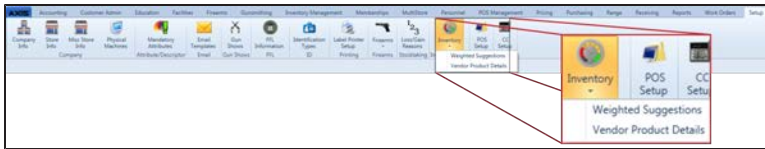
4. Click the **Submit** button to add/update the gun show on the list on the **Gun Shows** screen.
5. Click the tab's **Close** button to close the screen.

Manage Weighted Suggestions

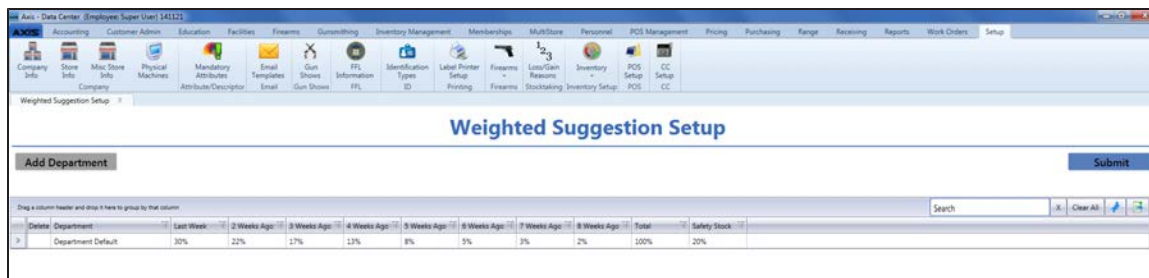
Complete the following procedure to set up and maintain weight percentages for departments.

Note: A user must be granted the **InventoryManagement**, **StoreManager**, or **Purchasing** permission to view/use this feature.

1. Navigate to the **Weighted Suggestion Setup** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Inventory > Weighted Suggestions** from the main menu to display the **Weighted Suggestion Setup** screen.



2. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as needed.
3. Complete the following procedures as needed to manage suggestion weights:

Modify a Department's Week Weight Values

1. Click a name in the **Department** column to activate that department's row.

Note: If the desired department does not exist, complete the [Add a Department](#) procedure to add it to the list.

2. Double-click the value in one of the department's week (**Last Week, 2 Weeks Ago, ... 8 Weeks Ago**) cells to highlight it.
3. Enter/edit the desired weight percentage.

Note: This value represents the relative weight of this week's sales versus sales in the other 7 weeks. The values in the department's 8 week cells must add up to 100%. Negative values are not allowed.

4. Modify other week cells in the row as needed to maintain the 100% total.
5. Press the **Enter** key to deactivate the department's row.

Note: If the week cell values do not add up to 100%, the department row is highlighted in red. Revise one or more cell values as needed.

6. Click the **Submit** button to save changes.

Note: The system will revise suggested min/max values for items in the department accordingly and update actual min/max values for department items that are set to automatic.

Modify a Department's Safety Stock Value

1. Click a name in the **Department** column to activate that department's row.

Note: If the desired department does not exist, complete the [Add a Department](#) procedure to add it to the list.

2. Double-click the value in the department's **Safety Stock** cell to highlight it.
3. Enter/edit the desired safety stock percentage.

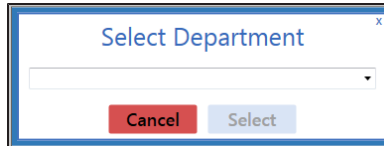
Note: This value represents additional stock (a percentage over and above the anticipated need) that is maintained to alleviate the risk of being out of stock during the lead time due to uncertainties in supply and demand.

4. Press the **Enter** key to deactivate the department's row.
5. Click the **Submit** button to save changes.

Note: The system will revise suggested min/max values for items in the department accordingly and update actual min/max values for items that are set to automatic.

Add a Department

1. Click the **Add Department** button to display the **Select Department** window.



2. Select a department from the drop-down.
3. Click the **Select** button to close the window and display the selected department on the list.
4. Click the **Submit** button to save changes.

Note: The system will revise suggested min/max values for items in the department accordingly and update actual min/max values for items that are set to automatic.

Delete a Department

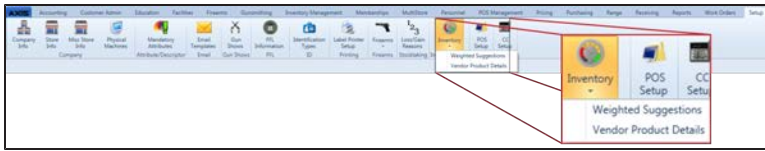
1. Click a department's **Delete** button to remove it from the list.
2. Click the **Submit** button to save changes.

Note: Items from the deleted department will revert to the "Department Default" department.

Manage the Vendor Product Detail Windows

Complete the following procedure to manage the display of the **Vendor Product Detail** window.

1. Navigate to the **Vendor Product Setup** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Inventory > Vendor Product Details** from the main menu to display the **Vendor Product Setup** screen.



2. Complete the following procedures as needed to manage the display of **Vendor Product Detail** windows:

Prevent All Vendor Product Detail Windows from Displaying

1. Check the **Disable Vendor Product Details pop-up screen** checkbox.
2. Click the tab's **Close** button to close the screen.

Allow Individual Vendor Product Detail Windows to Display

1. Uncheck the **Disable Vendor Product Details pop-up screen** checkbox.

Note: This setting allows each UPC-specific **Vendor Product Detail** window to be individually configured to display or not.

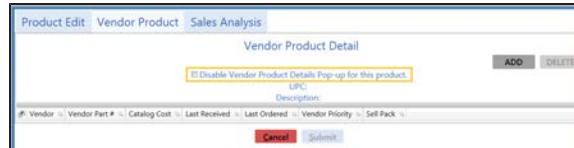
2. Click the tab's **Close** button to close the screen.
-

Configure an Individual Vendor Product Detail Window

1. Complete the procedure to [Allow Individual Vendor Product Detail Windows to Display](#).
2. Access a UPC's **Product Edit** window.

Note: Refer to [Manage Product Information \(see page 149\)](#) for information on accessing and using this window.

3. Click the **Vendor Product** tab to display it.



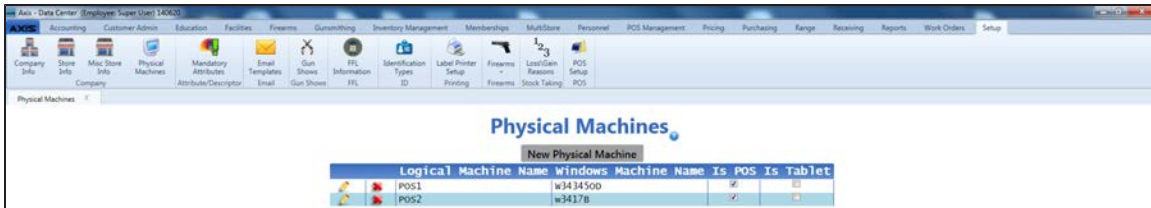
4. Check /uncheck the **Disable Vendor Product Details Pop-up for this product** checkbox to configure display settings for this UPC's **Vendor Product Detail** window:
 - Check the checkbox to prevent the window from displaying in the future.
 - Uncheck the checkbox to allow the window to display in the future.
 5. Click the **Submit** button to close the window.
-

Manage Physical Machines

1. Navigate to the **Physical Machines** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Physical Machines** from the main menu to display the **Physical Machines** screen.



2. Complete the following procedures as needed to manage physical machines:

Set Up a Physical Machine



1. Click the **New Physical Machine** button to display the **Define/Edit Physical Machine Mapping** window.

Define/Edit Physical Machine Mapping

Logical Name:

Windows System Name:

Is POS:

Is Tablet:

2. Continue with the procedure below.

Edit a Physical Machine



1. Click a machine's **Edit** button to display its **Define/Edit Physical Machine Mapping** window.

Define/Edit Physical Machine Mapping

Logical Name:

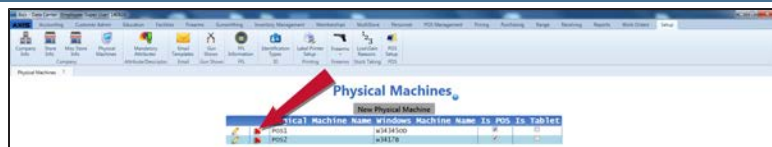
Windows System Name:

Is POS:

Is Tablet:

2. Continue with the procedure below.

Delete a Physical Machine



1. Click a machine's **Delete** button to remove it from the **Physical Machines** screen.
2. Click the tab's **Close** button to close the screen.

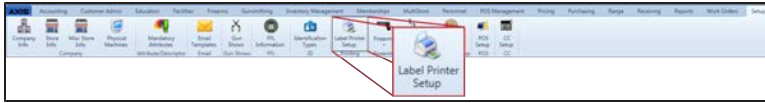
3. Enter/edit Physical Machine information in the window.

Logical Name	Enter the store's name for the component (e.g., Register 1).
Windows System Name	Enter the Windows System Name for the component. Note: The name assigned may not be a duplicate of another machine's name. If needed, complete the following to find the name: <ol style="list-style-type: none"> 1. Right-click the component's Computer icon to display a menu. 2. Click the Properties option to display system information. 3. Locate the Computer name.
Is POS	Check the checkbox if the component is a Point Of Sale (place where transactions occur).
Is Tablet	Check the checkbox if the component is a tablet.

4. Click the **Submit** button to close the **Define/Edit Physical Machine Mapping** window and add/update the machine in the list on the **Physical Machines** screen.
5. Click the tab's **Close** button to close the screen.

Manage Label Printers

1. Navigate to the **Label Printer Setup** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Label Printer Setup** from the main menu to display the **Label Printer Setup** screen.



2. Enter the name of firearm label printer in the **Firearm Label** field.
3. Select the firearm label format in the corresponding **Label Format** field.

Note: The following firearm label formats are available.



Each format includes barcodes for the firearm's UPC and log number. Format 2 includes a third barcode for the firearm's cost.

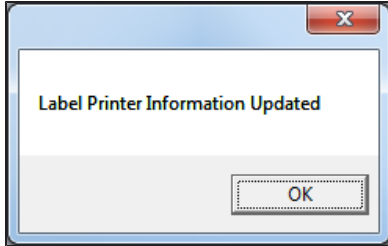
4. Enter the name of product label printer in the **Product Label** field.
5. Select the product label format in the corresponding **Label Format** field.
6. If desired, check the **Default to print labels during Receiving** checkbox to automatically check the print label checkboxes on the **Label Printing** window during the receiving process.

Note: If this checkbox is not checked, the print label checkboxes on the **Label Printing** window will not be automatically checked.

7. If desired, check the **Default to print labels during Invoicing** checkbox to automatically check the print label checkboxes on the **Label Printing** window during the invoicing process.

Note: If this checkbox is not checked, the print label checkboxes on the **Label Printing** window will not be automatically checked.

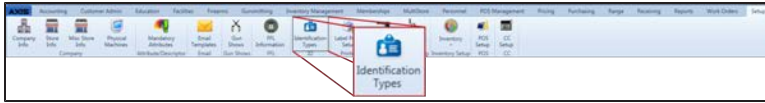
8. Click the **Submit** button to display an update confirmation window.



9. Click the **OK** button to close the window.

Manage Identification Types

1. Navigate to the **Identification Types** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

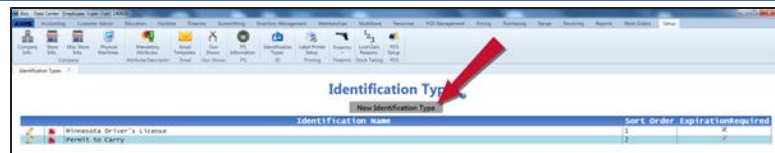


2. Select **Setup > Identification Types** from the main menu to display the **Identification Types** screen.



2. Complete the following procedures as needed to manage identification types:

Set Up an Identification Type



1. Click the **New Identification Type** button to display the **Define/Edit Identification Type** window.

Define/Edit Identification Type

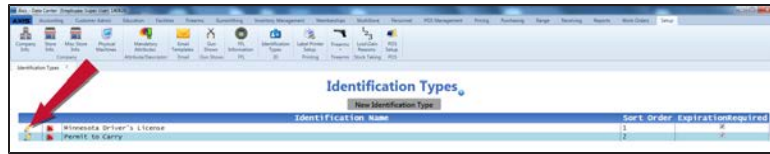
Identification Name:

Sort Order:

Expiration Required:

2. Continue with the procedure below.

Edit an Identification Type



1. Click a identification type's **Edit** button to display its **Define/Edit Identification Type** window.

Define/Edit Identification Type

Identification Name:

Sort Order:

Expiration Required:

2. Continue with the procedure below.

Delete an Identification Type



1. Click a identification type's **Delete** button to remove it from the list on the **Identification Types** screen.
2. Click the tab's **Close** button to close the screen.

3. Enter/edit Identification Type information on the window.

Identification Name	Enter a name for the ID Type (e.g., <i>State Driver's License</i> ; <i>Military ID</i> ; <i>Permit to Carry</i> , etc.)
Sort Order	Enter a number (i.e., 0, 1, 2, etc.) to indicate the placement of this ID Type in a drop-down menu. The drop-down menu displays ID Types by their sort order numbers from lowest (at the top of the list) to highest (at the bottom).
Expiration Required	Check the checkbox to require a valid expiration date for the ID Type to be accepted.

4. Click the **Submit** button to add/update the identification type in the list on the **Identification Types** screen.
5. Click the tab's **Close** button to close the screen.

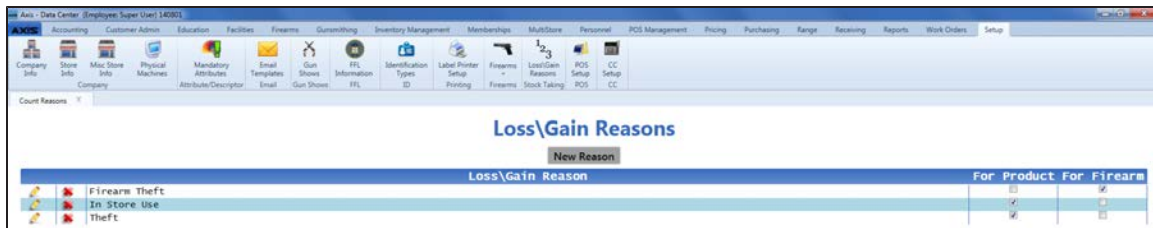
Manage Loss/Gain (Stock Discrepancy) Reasons

1. Navigate to the **Loss/Gain Reasons** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > Loss/Gain Reasons** from the main menu to display the **Loss/Gain Reasons** screen.



2. Complete the following procedures as needed to manage loss/gain reasons:

Set Up a Loss/Gain Reason

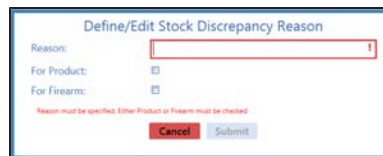
1. Click the **New Reason** button to display the **Define/Edit Stock Discrepancy Reason** window.



2. Continue with the procedure below.

Edit a Loss/Gain Reason

1. Click a reason's **Edit** button to display its **Define/Edit Stock Discrepancy Reason** window.



2. Continue with the procedure below.

Delete a Loss/Gain Reason

1. Click a reason's **Delete** button to remove it from the list on the **Loss/Gain Reasons** screen.
2. Click the tab's **Close** button to close the screen.

3. Enter/edit Loss/Gain Reason information on the window.

Note: Required fields and settings are displayed with red borders.

Reason	Enter a descriptive reason for a loss or gain (e.g., Theft, In Store Use, etc.)
For Product	Check the checkbox if the reason applies to standard (non-firearm) products.
For Firearm	Check the checkbox if the reason applies to firearms.

4. Click the **Submit** button to add/update the reason on the list on the **Loss/Gain Reasons** screen.

5. Click the tab's **Close** button to close the screen.

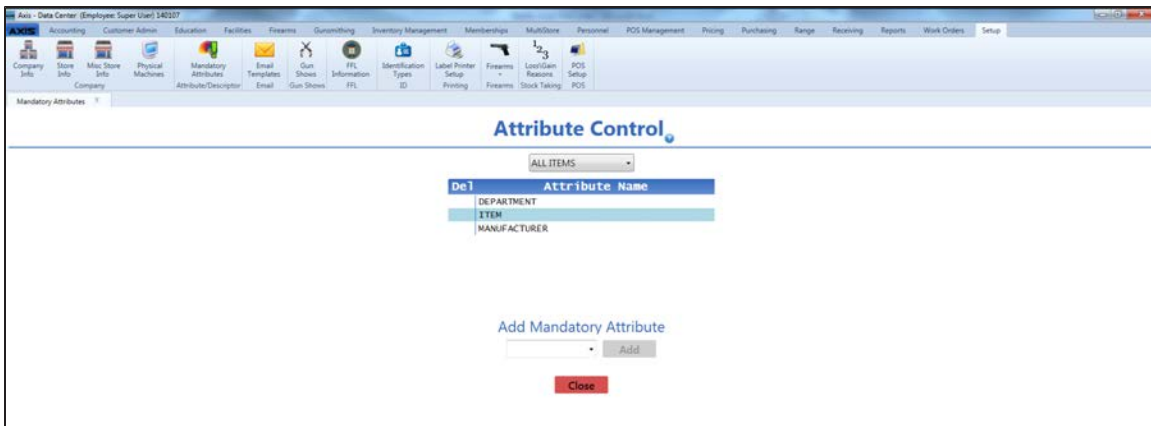
Manage Mandatory Attributes

1. Navigate to the **Attribute Control** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

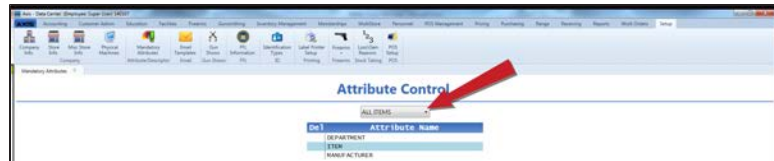


2. Select **Setup > Mandatory Attributes** from the main menu to display the **Attribute Control** screen.



2. Complete the following procedures as needed to manage mandatory attributes:

Set Up a Mandatory Attribute



1. Select the appropriate Item Descriptor from the drop-down field near the top of the screen.

Note: If the mandatory attribute will apply to all items, select **All Items** from the drop-down field.

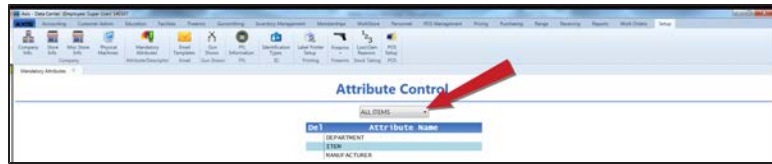
2. Complete either of these procedures to select the desired mandatory attribute:

- Select the attribute from the **Add Mandatory Attribute** drop-down field.
- Enter the name of a new attribute in the **Add Mandatory Attribute** field.

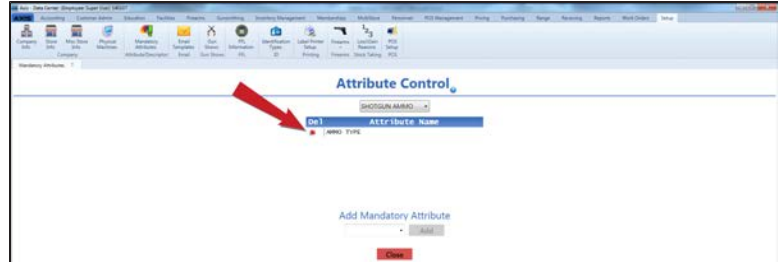
Note: Be sure to spell and capitalize the attribute name correctly as it cannot be edited after entry.

3. Click the **Add** button to add the selected attribute to the **Attribute Name** list.
4. Click the **Close** button to close the screen.

Remove a Mandatory Attribute for an Item Descriptor



1. Select the appropriate Item Descriptor from the drop-down field near the top of the screen.



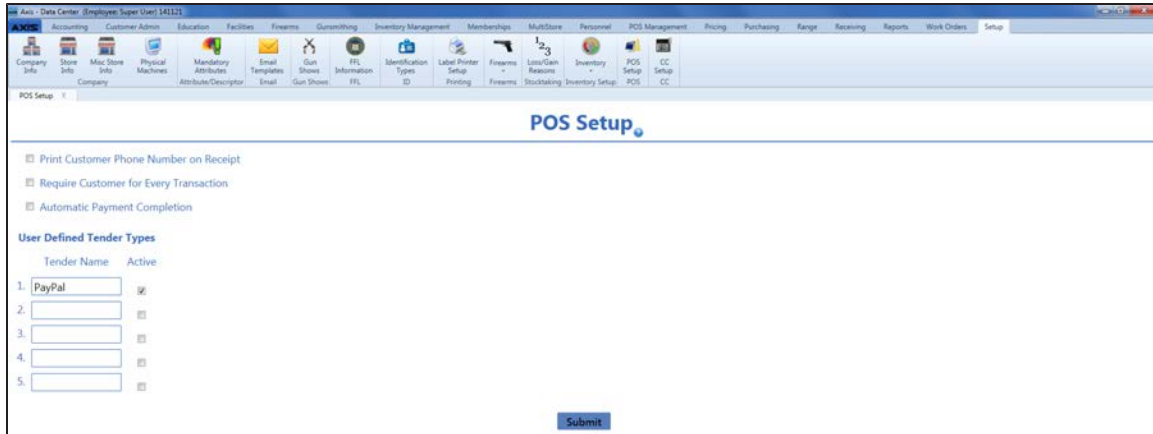
2. Click an attribute's **Delete** button to remove it from the **Attribute Name** list.
 3. Click the **Close** button to close the screen.
-

Manage POS Options

1. Navigate to the **POS Setup** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Setup > POS Setup** from the main menu to display the **POS Setup** screen.



2. Complete the following procedures as needed to manage POS options:

Include the Customer's Phone Number on Receipts

1. Check the **Print Customer Phone Number on Receipt** checkbox to include the customer's phone number on printed and electronic receipts.
2. Click the **Submit** button to display a save confirmation window.
3. Click the **Close** button to close the window.

Require Customer Selection to Start a Transaction

1. Check the **Require Customer for Every Transaction** checkbox to require a customer be selected (or added) for every transaction in the **Register** application.
2. Click the **Submit** button to display a save confirmation window.
3. Click the **Close** button to close the window.

Automate Transaction Payment Completion

1. Check the **Automatic Payment Completion** checkbox to complete transaction payments automatically (without clicking the **Submit** button) in the **Register** application simply by entering sufficient tender to cover the total amount.
 2. Click the **Submit** button to display a save confirmation window.
 3. Click the **Close** button to close the window.
-

Define a Unique Tender Type

1. Enter a name for the tender type in a blank **Tender Name** field.
 2. Check the corresponding **Active** checkbox to make the tender type available in the **Register** application.
 3. Click the **Submit** button to display a save confirmation window.
 4. Click the **Close** button to close the window.
-

MultiStore Administration

The MultiStore Module is currently under construction.

Personnel Administration

This section contains procedures to set up, maintain, and review personnel data including personal information, system credentials, work histories, and a list of all employees.

Personal Information

Personal Information includes the employee's name, title, Social Security Number, addresses, phone numbers, email addresses, and important dates.

- [Select an Employee \(see page 98\)](#)
- [Manage Employee Records \(see page 100\)](#)

System Credentials

System Credentials include an employee's login ID, password, and roles.

- [Manage an Employee's System Credentials \(see page 102\)](#)

Employee List

The Employee List displays all employees and approved system users.

- [View the Employee List \(see page 104\)](#)

Work Histories

Work Histories provide records of an employee's transactions and services.

- [View an Employee's Transactions \(see page 105\)](#)
- [View an Employee's Layaways \(see page 106\)](#)
- [View an Employee's Product Holds \(see page 107\)](#)
- [View an Employee's Special Orders \(see page 108\)](#)
- [View an Employee's Completed Work Orders \(see page 109\)](#)

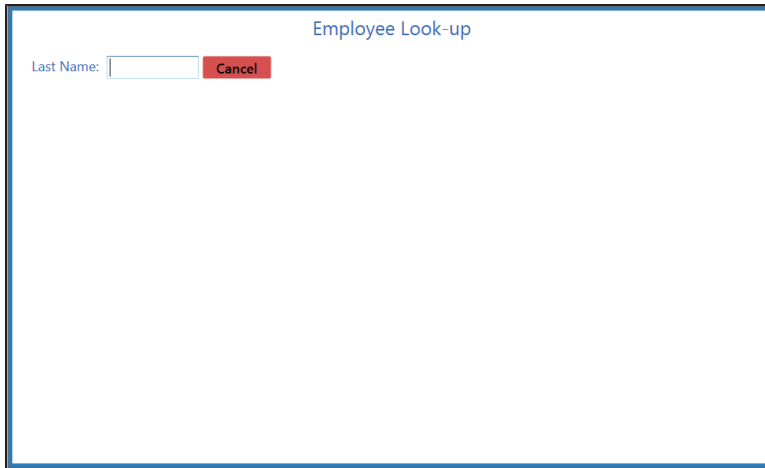
Select an Employee

Note: This procedure selects an **existing** employee from the personnel database for review and maintenance of the employee's record. To add a new employee to the database, refer to [Manage Employee Records \(see page 100\)](#).

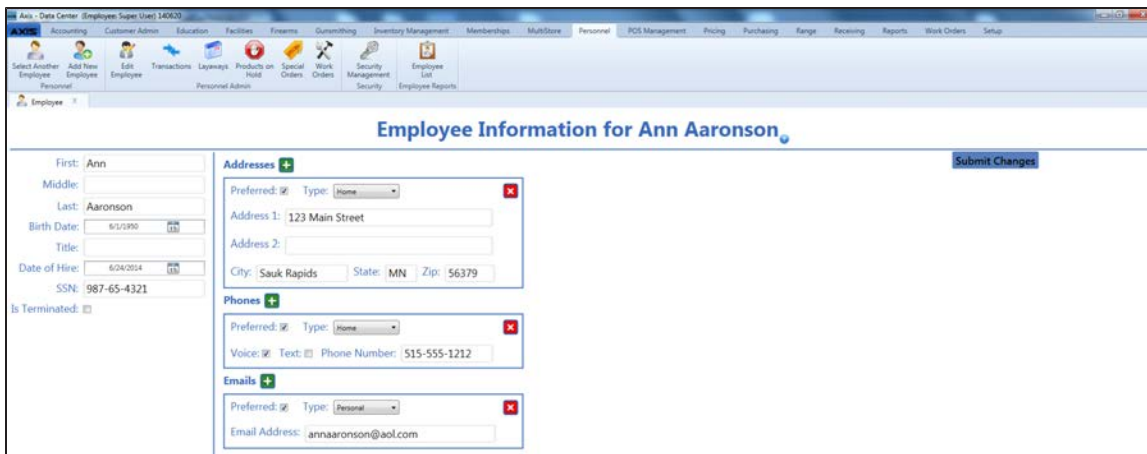
1. Navigate to the **Employee Look-up** window.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Personnel > Select Employee** from the main menu to display the **Employee Look-up** window.

A screenshot of the 'Employee Look-up' window. It features a search field labeled 'Last Name:' with a red 'Cancel' button to its right. The window title is 'Employee Look-up'.

2. Enter all or part of the employee's last name in the **Last Name** field to display all matching results.
3. Double-click a name to select the employee and display the employee's **Employee Information for** screen.

A screenshot of the 'Employee Information for Ann Aaronson' screen. The window title is 'Employee Information for Ann Aaronson'. It displays various fields for personal information: First: Ann, Middle: (empty), Last: Aaronson, Birth Date: 6/12/1990, Title: (empty), Date of Hire: 6/24/2014, SSN: 987-65-4321, and Is Terminated: (checkbox). There are sections for 'Addresses', 'Phones', and 'Emails'. The 'Addresses' section shows a preferred home address: 123 Main Street, Sauk Rapids, MN, 56379. The 'Phones' section shows a preferred home phone number: 515-555-1212. The 'Emails' section shows a preferred personal email address: annaaronson@aol.com. A 'Submit Changes' button is located in the top right corner.

4. Complete the following procedures as needed:

- [Manage Employee Records \(see page 100\)](#)

Note: The employee record includes the employee's name, title, Social Security Number, addresses, phone numbers, email addresses, and important dates.

- [Manage an Employee's System Credentials \(see page 102\)](#)

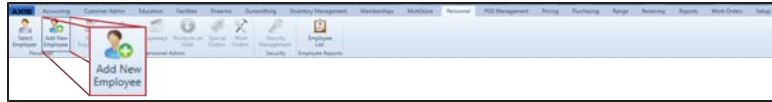
Note: System credentials include an employee's login ID, password, and roles..

5. Click the tab's **Close** button to close the screen.

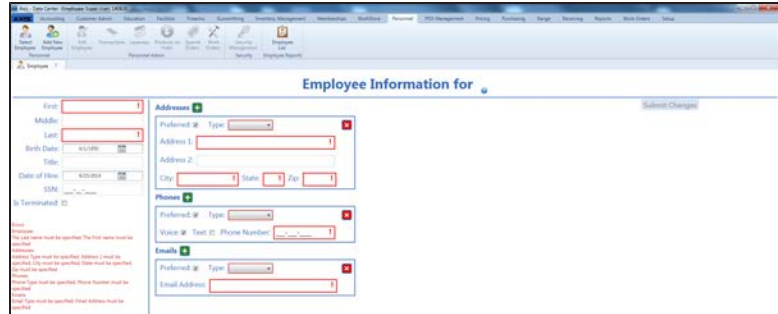
Manage Employee Records

1. Complete the following procedures as needed to manage employee records:

Add an Employee Record



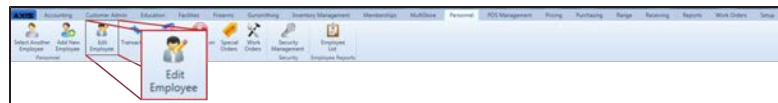
1. Select **Personnel > Add New Employee** from the main menu to display a blank **Employee Information for** screen.



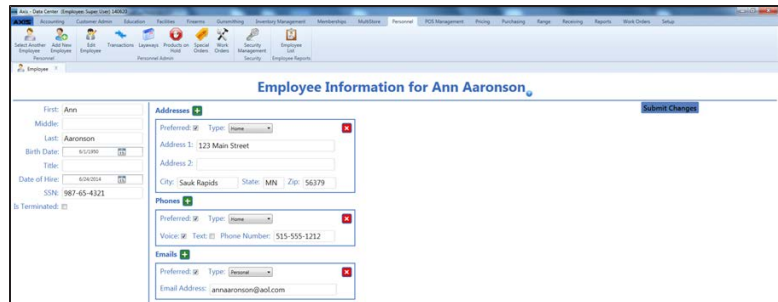
2. Continue with the procedure below.

Edit an Employee Record

1. Select an Employee (see page 98).



2. If needed, select **Personnel > Edit Employee** from the main menu to display the employee's **Employee Information for** screen.



3. Continue with the procedure below.

2. Enter/edit Employee information on the screen.

Note: Required fields and settings are displayed with red borders.

First	Enter the employee's first name.
Middle	Enter the employee's middle name.
Last	Enter the employee's last name.
Birth Date	Enter the employee's birth date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Title	Enter the employee's title.

Date of Hire	Enter the employee's hiring date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.	
SSN	Enter the employee's Social Security number.	
Is Terminated	Check the box if the employee has been terminated.	
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
Phones	If a phone record is not needed, click its Close (red X) button to close it. If an additional phone record is needed, click the Add (green +) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.

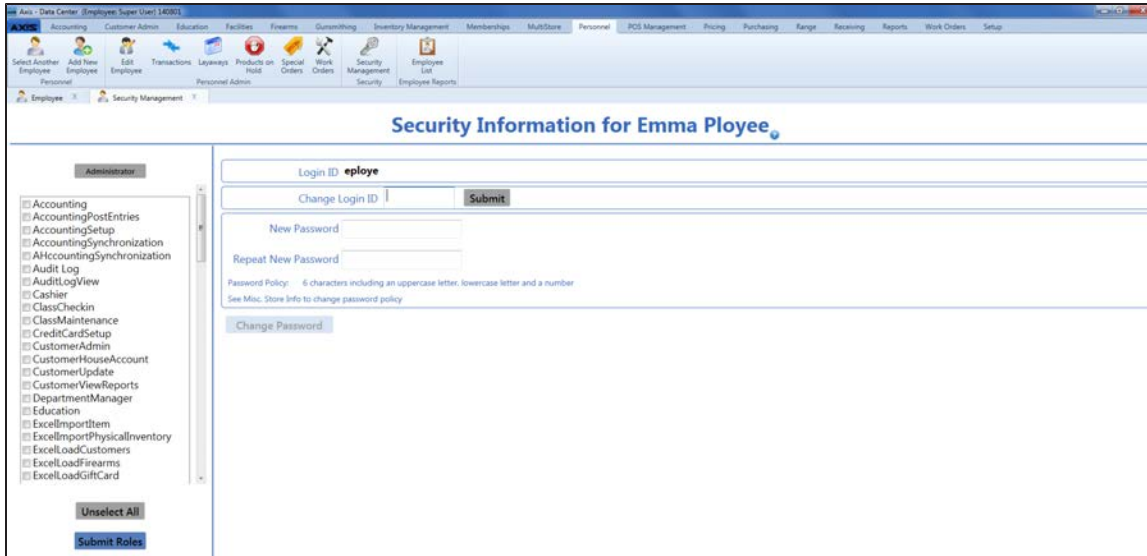
3. Click the **Submit Changes** button to display a **Record Saved** confirmation note under the button.
4. Click the tab's **Close** button to close the screen.

Manage an Employee's System Credentials

1. Select an Employee (see page 98).



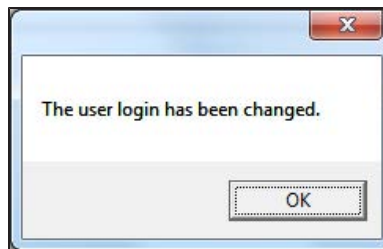
2. Select **Personnel > Security Management** from the main menu to display the employee's **Security Information for** screen.



3. Complete the following procedures as needed to manage employee credentials:

Change an Employee's Login ID

1. Enter a new login ID in the **Change Login ID** field.
2. Click the **Submit** button to display a change confirmation window.



3. Click the **OK** button to close the change confirmation window.

Change an Employee's Password

1. Enter a new password in the **New Password** field.
 2. Enter the new password again in the **Repeat New Password** field.
 3. Click the **Change Password** button to display a **Record Saved** confirmation note in the lower left portion of the screen.
-

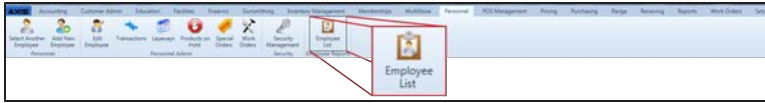
Select Roles (Permissions) for an Employee

1. Complete the following procedures as needed to select the desired set of roles for the employee:
 - Check a role to select it for the employee.
 - Uncheck a role to deselect it for the employee.
 - Click the **Administrator** button to select all roles for the employee.
 - Click the **Unselect** button to deselect all roles for the employee.
 2. Click the **Submit Roles** button to display a **Record Saved** confirmation note in the lower left portion of the screen.
-
4. Click the tab's **Close** button to close the screen.

View the Employee List

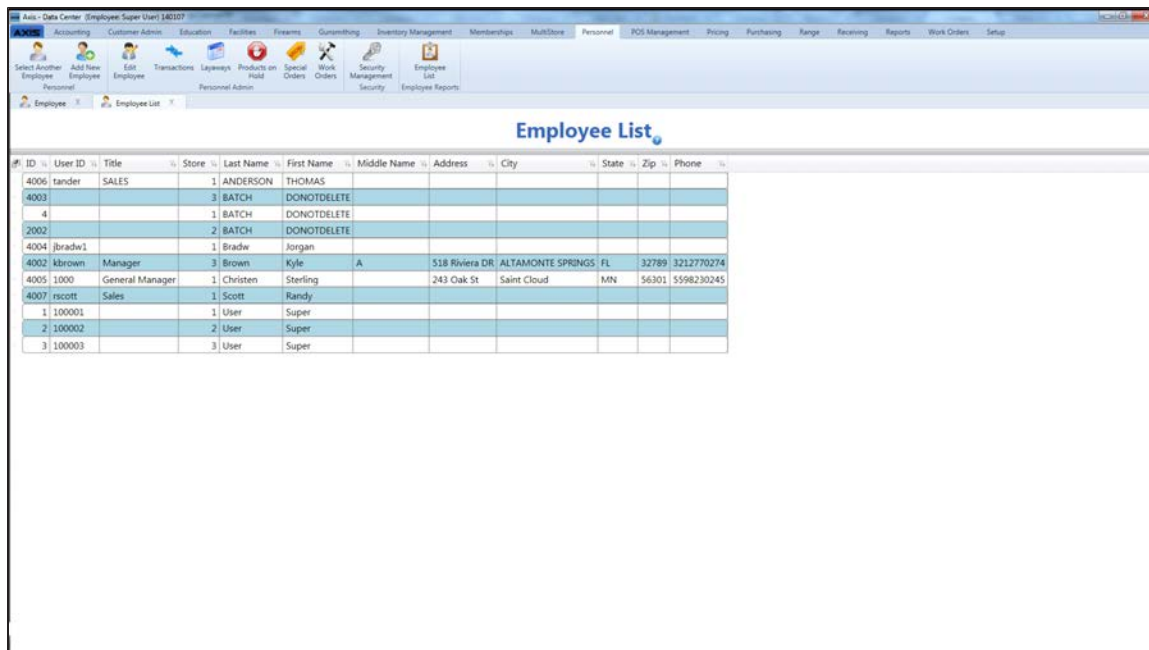
1. Navigate to the **Employee List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Personnel > Employee List** from the main menu to display the **Employee List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

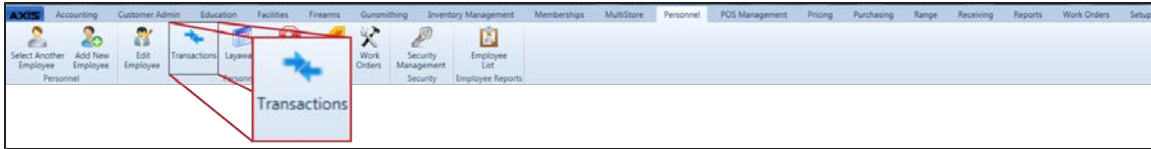
A screenshot of the 'Employee List' screen. The screen title is 'Employee List'. Below the title is a table with columns: ID, User ID, Title, Store, Last Name, First Name, Middle Name, Address, City, State, Zip, and Phone. The table contains several rows of employee data.

ID	User ID	Title	Store	Last Name	First Name	Middle Name	Address	City	State	Zip	Phone
4006	tander	SALES	1	ANDERSON	THOMAS						
4003			3	BATCH	DONOTDELETE						
4			1	BATCH	DONOTDELETE						
2002			2	BATCH	DONOTDELETE						
4004	bradw1		1	Bradw	Jorgan						
4002	lbrown	Manager	3	Brown	Kyle	A	518 Riviera DR	ALTAMONTE SPRINGS	FL	32789	3212770274
4005	1000	General Manager	1	Christen	Sterling		243 Oak St	Saint Cloud	MN	56301	5598230245
4007	rcott	Sales	1	Scott	Randy						
1	100001		1	User	Super						
2	100002		2	User	Super						
3	100003		3	User	Super						

2. Click the tab's **Close** button to close the screen.

View an Employee's Transactions

1. Select an Employee (see page 98).



2. Select **Personnel > Transactions** from the main menu to display the employee's **Transactions of** screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

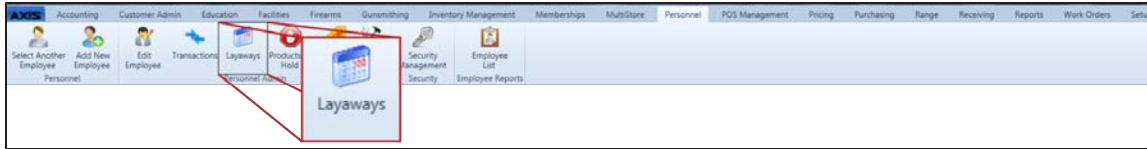
The screenshot shows the 'Transactions of Super User' screen. The table displays the following data:

Time Stamp	Customer	Transaction Status	Taxable	Active
Wed May 15 2013 08:07 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Wed May 15 2013 08:09 PM	Shoot Straight, INC Shoot Straight Mas D		False	True
Wed May 15 2013 08:16 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Wed Jun 12 2013 11:55 PM	Shoot Straight, INC Shoot Straight Mas D		False	True
Thu Jun 13 2013 12:11 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Thu Jun 13 2013 12:20 PM	Shoot Straight, INC shoot Straight Mas D		False	True
Tue Jun 18 2013 11:06 AM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Tue Jun 18 2013 11:10 AM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Tue Jun 18 2013 01:18 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Tue Jun 18 2013 04:48 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Tue Jun 18 2013 04:49 PM	Shoot Straight Tampa, INC Shoot StraigD		False	True
Wed Jun 19 2013 02:29 PM	Drew Knapp	C	True	True
Wed Jun 19 2013 02:29 PM	Drew Knapp	C	True	True
Thu Jun 20 2013 08:06 AM	Drew Knapp	C	True	True
Thu Jun 20 2013 08:38 AM	Drew Knapp	C	True	True
Thu Jun 20 2013 08:41 AM	Drew Knapp	C	True	True
Thu Jun 20 2013 02:46 PM	Drew Knapp	C	True	True
Fri Sep 27 2013 02:18 AM	Nick Adams	C	True	True
Fri Sep 27 2013 02:37 AM	Nick Adams	C	True	True
Fri Sep 27 2013 02:40 AM	Anonymous	C	True	True
Fri Sep 27 2013 02:43 AM	Anonymous	C	True	True
Sat Sep 28 2013 05:35 AM	Jake Barnes	C	True	True
Sat Sep 28 2013 05:40 AM	Nick Adams	C	True	True
Sat Sep 28 2013 05:59 AM	Nick Adams	C	True	True
Sat Sep 28 2013 06:16 AM	Nick Adams	C	True	True
Sat Sep 28 2013 07:58 AM	Joseph Yossarian	C	True	True
Sat Sep 28 2013 08:27 AM	Nick Adams	C	True	True
Sat Sep 28 2013 08:31 AM	Joseph Yossarian	C	True	True
Sat Sep 28 2013 08:50 AM	Nick Adams	C	True	True
Sat Sep 28 2013 08:53 AM	Nick Adams	C	True	True
Sat Sep 28 2013 09:47 AM	Auggie March	C	True	True
Sat Sep 28 2013 09:51 AM	Auggie March	C	True	True
Sat Sep 28 2013 09:54 AM	Celie Walker	C	True	True
Sat Sep 28 2013 09:56 AM	Celie Walker	C	True	True
Sat Sep 28 2013 09:58 AM	Celie Walker	C	True	True
Sat Sep 28 2013 10:00 AM	Celie Walker	C	True	True

3. Click the tab's **Close** button to close the screen.

View an Employee's Layaways

1. Select an Employee (see page 98).



2. Select **Personnel > Layaways** from the main menu to display the employee's **Layaways of** screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

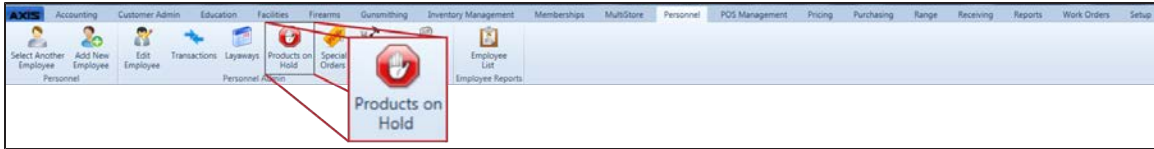
A screenshot of the 'Layaways of Super User' screen. The screen displays a table with the following data:

CUSTOMER	CUSTOMER ID	Time Stamp	Terms ID	Total	Completed
Charissa Da11oway	4021	October 01, 2013	0	\$21.30	False
Nick Adams	4026	October 03, 2013	0	\$798.75	True
Nick Adams	4026	October 08, 2013	0	\$798.75	False
Nick Adams	4026	October 11, 2013	0	\$7.99	False
Hazel Motes	4036	January 09, 2014	0	\$18.74	False
Hazel Motes	4036	January 09, 2014	0	\$10.75	False
Hazel Motes	4036	January 17, 2014	0	\$17.20	False
Hazel Motes	4036	March 13, 2014	0	\$21.30	False

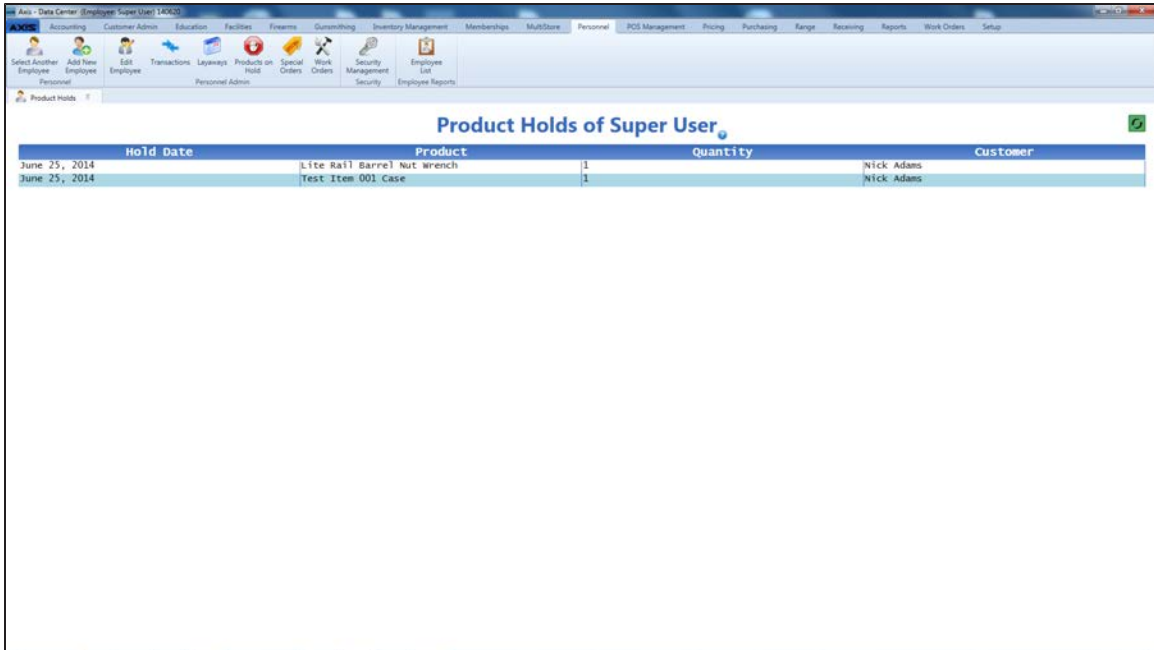
3. Click the tab's **Close** button to close the screen.

View an Employee's Product Holds

1. Select an Employee (see page 98).



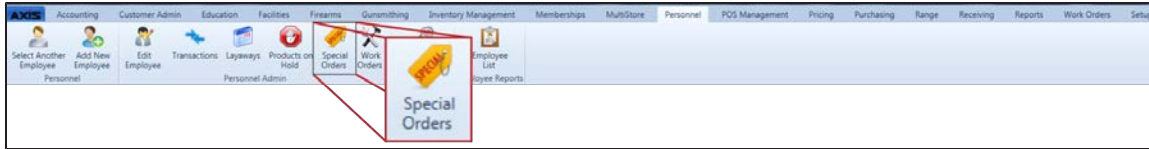
2. Select **Personnel > Products on Hold** from the main menu to display the employee's **Product Holds** of screen.



3. Click the tab's **Close** button to close the screen.

View an Employee's Special Orders

1. Select an Employee (see page 98).



2. Select **Personnel > Special Orders** from the main menu to display the employee's **Special Orders** of screen.

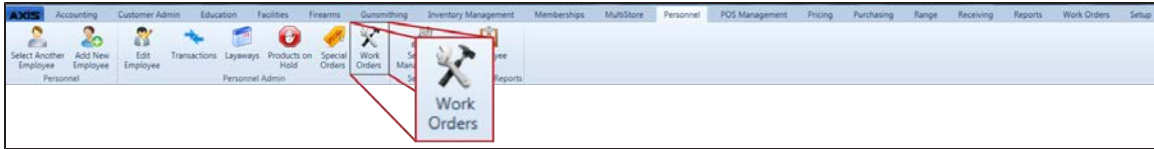
The screenshot displays the 'Special Orders of Super User' window. The window title is 'Special Orders of Super User'. Below the title bar is a table with the following columns: Completed, Terms, Special Order Date, Customer, Active, and Notes. The table contains 25 rows of data.

Completed	Terms	Special Order Date	Customer	Active	Notes
False	Minimum 25 % of the total due no	September 28, 2013	Jake Barnes	True	SIG SAUER P238 Holster
True	Minimum 25 % of the total due no	September 28, 2013	Nick Adams	True	
True	Minimum 25 % of the total due no	September 28, 2013	Nick Adams	True	
False	Minimum 25 % of the total due no	September 28, 2013	Joseph Yossarian	True	1
True	Minimum 25 % of the total due no	September 28, 2013	Nick Adams	True	
False	Minimum 25 % of the total due no	September 28, 2013	Augie March	True	
False	Minimum 25 % of the total due no	September 28, 2013	Celie Walker	True	
False	Minimum 25 % of the total due no	September 28, 2013	Celie Walker	True	
False	Minimum 25 % of the total due no	September 28, 2013	Celie Walker	True	
False	Minimum 25 % of the total due no	September 28, 2013	Charlie Marlow	True	
True	Minimum 25 % of the total due no	September 28, 2013	Santiago Hemingway	True	
False	Minimum 25 % of the total due no	September 28, 2013	Santiago Hemingway	True	
True	Minimum 25 % of the total due no	September 28, 2013	Santiago Hemingway	True	
False	Minimum 25 % of the total due no	September 28, 2013	Santiago Hemingway	True	
False	Minimum 25 % of the total due no	October 01, 2013	Clarissa Dalloway	True	
True	Minimum 25 % of the total due no	October 08, 2013	Nick Adams	True	
True	Minimum 25 % of the total due no	October 10, 2013	Nick Adams	True	
True	Minimum 25 % of the total due no	October 10, 2013	Nick Adams	True	new fang-dangled 1ten #27475
True	Minimum 25 % of the total due no	October 11, 2013	Jordan Bradwaast	True	
True	Minimum 25 % of the total due no	October 11, 2013	Jordan Bradwaast	True	
True	Minimum 25 % of the total due no	October 11, 2013	Mathew Christensen	True	
False	Minimum 25 % of the total due no	October 11, 2013	Nick Matthews	True	
False	Minimum 25 % of the total due no	October 11, 2013	Nick Adams	True	
False	Minimum 25 % of the total due no	October 11, 2013	Nick Matthews	True	
False	Minimum 25 % of the total due no	October 11, 2013	Nick Matthews	True	
True	Minimum 25 % of the total due no	October 11, 2013	Nick Matthews	True	
False	Minimum 25 % of the total due no	October 12, 2013	Jake Barnes	True	
True	Minimum 25 % of the total due no	October 29, 2013	Nick Adams	True	WIDGET 123
False	Minimum 25 % of the total due no	January 09, 2014	Hazel Notes	True	
False	Minimum 25 % of the total due no	January 09, 2014	Hazel Notes	True	
False	Minimum 25 % of the total due no	March 26, 2014	Hazel Notes	True	

3. Click the tab's **Close** button to close the screen.

View an Employee's Completed Work Orders

1. Select an Employee (see page 98).



2. Select **Personnel > Work Orders** from the main menu to display the employee's **Work Orders** of screen.

A screenshot of the 'Work Orders of Super User' screen. The screen title is 'Work Orders of Super User'. Below the title is a table with the following columns: Customer, Customer ID, Terms, Work Description, Work Order Date, Due Date, Completed, Delivered, and Active. The table contains 18 rows of work order data.

Customer	Customer ID	Terms	Work Description	Work Order Date	Due Date	Completed	Delivered	Active
Nick Adams	4026	Payable upon completion	STRING AND TUNE MATTHEWS	October 07, 2013	October 24, 2013	True	True	True
Nick Adams	4026		Sharpen Bullet	October 11, 2013	October 21, 2013	True	True	True
Nick Adams	4026			October 11, 2013	October 21, 2013	True	False	True
Edgar Tarzan	4084		Fix it	October 11, 2013	October 21, 2013	True	True	True
Edgar Tarzan	4084		Fix broken grip	October 11, 2013	October 21, 2013	True	False	True
Nick Adams	4026		sharpen Bullet	October 11, 2013	October 21, 2013	True	True	True
Nick Adams	4026	Payable upon completion	Labor	October 17, 2013	October 24, 2013	True	True	True
Nick Adams	4026			October 17, 2013	October 27, 2013	True	False	True
Nick Adams	4026	Payable upon completion	Sharpen knife	October 24, 2013	November 07, 2013	True	True	True
Nick Adams	4026	Payable upon completion	Sharpen knife	October 24, 2013	November 07, 2013	True	True	True
Nick Adams	4026		DRILL AND TAP FOR SIGHT	October 29, 2013	November 08, 2013	False	False	True
Hazel Motes	4036		fix moving parts	January 13, 2014	January 23, 2014	True	True	True
Hazel Motes	4036	Payable upon completion	(not?) gunsmithing	January 17, 2014	February 14, 2014	False	False	True
Hazel Motes	4036	Payable upon completion	february work order	February 04, 2014	February 26, 2014	False	False	True
Hazel Motes	4036		Repair Firing Pin	March 12, 2014	March 22, 2014	True	False	True
Hazel Motes	4036	Payable upon completion	work order 001	March 12, 2014	March 19, 2014	False	False	True

3. Click the tab's **Close** button to close the screen.

Customer Administration

This section contains procedures to set up, maintain, and review customer data including personal information, ID types, house accounts, purchase histories, and an assortment of useful customer lists.

Personal Information

Personal Information includes the customer's name, ID numbers, addresses, phone numbers, email addresses, websites, important dates, and notes.

- [Select a Customer \(see page 113\)](#)
- [Set Up and Maintain a Customer Record \(see page 114\)](#)
- [Clear the Currently Selected Customer \(see page 117\)](#)

Customer List

The Customer List collects every customer record in the database into a single list. This list can be exported to Excel for use outside the system. The **Customer List** screen provides tools for identifying and dealing with duplicate customer records.

- [View and Update the Customer List \(see page 118\)](#)
- [Import Customer Data \(see page 119\)](#)
- [Manage System-Identified Duplicate Customer Records \(see page 121\)](#)
- [Manage Manually Identified Duplicate Customer Records \(see page 126\)](#)

Best Customer List

The Best Customer List determines the top-spending customers in the database and displays them in a sorted list. The list defaults to showing the top 25 customers but can be configured to display a larger list.

- [View the Best Customer List \(see page 129\)](#)

ID Types

ID Types include the variety of credentials (drivers licenses, military IDs, carry permits, etc.) with which a customer's identity may be verified.

- [Manage Identification Types \(see page 87\)](#)

Alias IDs

An Alias ID provides an easier and simpler way of identifying a customer in the **Register** application. The **Customer Alias ID Update** screen displays every customer record in the database along with its Alias ID (if assigned) and provides a tool for assigning an Alias ID to a customer or editing an existing Alias ID.

- [View and Update the Customer Alias ID List \(see page 130\)](#)

House Accounts

House Accounts allow customers to charge purchases to an account (up to a preset limit) and pay the balance at a future date. The House Accounts Report provides an up-to-date overview of all house accounts including account holders and balances.

- [Set Up and Edit a Customer's House Account \(see page 131\)](#)
- [View the House Accounts Report \(see page 134\)](#)

Deposits

Deposits allow customers to provide funds toward future purchases (particularly firearms). A deposit must be redeemed all at once. The Deposits List screen provides an up-to-date list of all active deposits.

- [View the Deposits List \(see page 135\)](#)

Purchase Histories

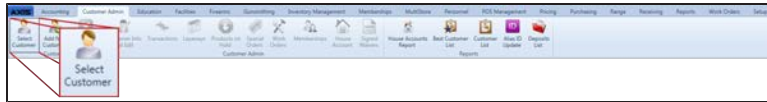
Purchase Histories provide a record of a customer's transactions, purchased services, memberships, and signed waivers.

- [View and Use a Customer's Transactions History \(see page 136\)](#)
- [View and Update a Customer's Memberships \(see page 138\)](#)
- [View and Print a Customer's Signed Waivers \(see page 141\)](#)
- [View a Customer's Layaways \(see page 142\)](#)
- [View a Customer's Product Holds \(see page 143\)](#)
- [View and Update a Customer's Special Orders \(see page 144\)](#)
- [View a Customer's Completed Work Orders \(see page 146\)](#)

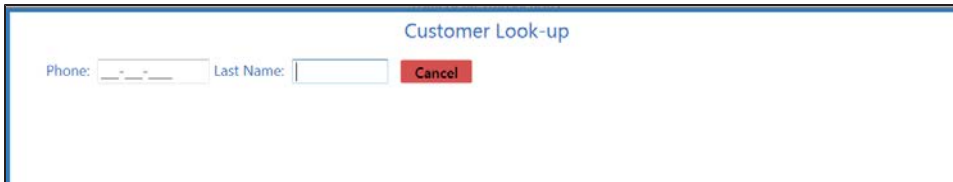
Select a Customer

Note: This procedure selects an **existing** customer from the customer database for review and maintenance of the customer's record. To add a new customer to the database, refer to [Set Up and Maintain a Customer Record](#) (see page 114).

1. Navigate to the **Customer Look-up** window.
 1. [Log In to the Data Center Application](#) (see page 16) to display the **Data Center Main Menu** screen.



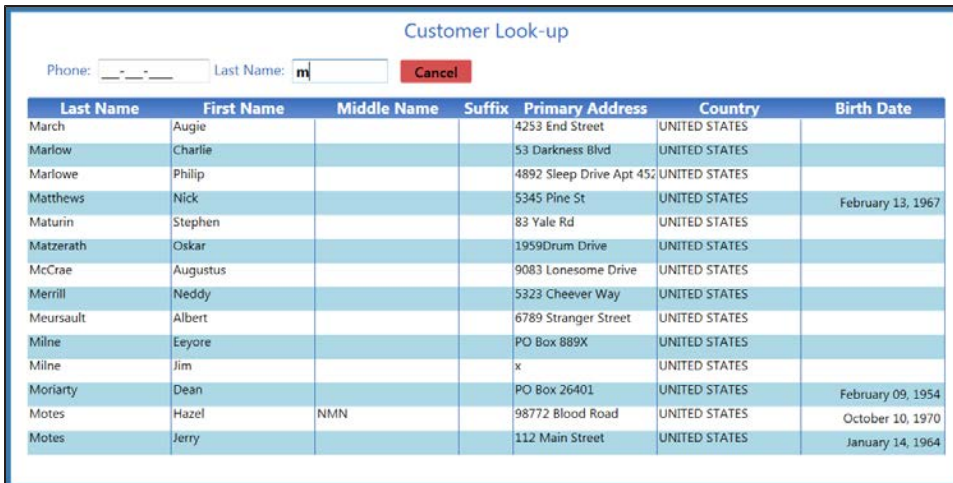
2. Select **Customer Admin > Select Customer** from the main menu to display the **Customer Look-up** window.



Customer Look-up

Phone: Last Name:

2. Complete either of these procedures:
 - Enter the customer phone number in the **Phone** field.
 - Enter all or part of the customer's last name in the **Last Name** field.
3. Press the **Enter** key on the keyboard to display all matching results.




Customer Look-up

Phone: Last Name:

Last Name	First Name	Middle Name	Suffix	Primary Address	Country	Birth Date
March	Augie			4253 End Street	UNITED STATES	
Marlow	Charlie			53 Darkness Blvd	UNITED STATES	
Marlowe	Philip			4892 Sleep Drive Apt 452	UNITED STATES	
Matthews	Nick			5345 Pine St	UNITED STATES	February 13, 1967
Maturin	Stephen			83 Yale Rd	UNITED STATES	
Matzerath	Oskar			1959Drum Drive	UNITED STATES	
McCrae	Augustus			9083 Lonesome Drive	UNITED STATES	
Merrill	Neddy			5323 Cheever Way	UNITED STATES	
Meursault	Albert			6789 Stranger Street	UNITED STATES	
Milne	Eeyore			PO Box 889X	UNITED STATES	
Milne	Jim			x	UNITED STATES	
Moriarty	Dean			PO Box 26401	UNITED STATES	February 09, 1954
Motes	Hazel	NMN		98772 Blood Road	UNITED STATES	October 10, 1970
Motes	Jerry			112 Main Street	UNITED STATES	January 14, 1964

4. Double-click a name to select the customer and display the **Overview** of screen for the customer.



Overview

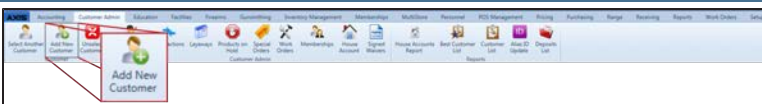
Overview of Hazel Motes

Total of all Transactions: \$712.50
Total of all Special Orders: \$850.00
Total of all Deposits: \$250.00

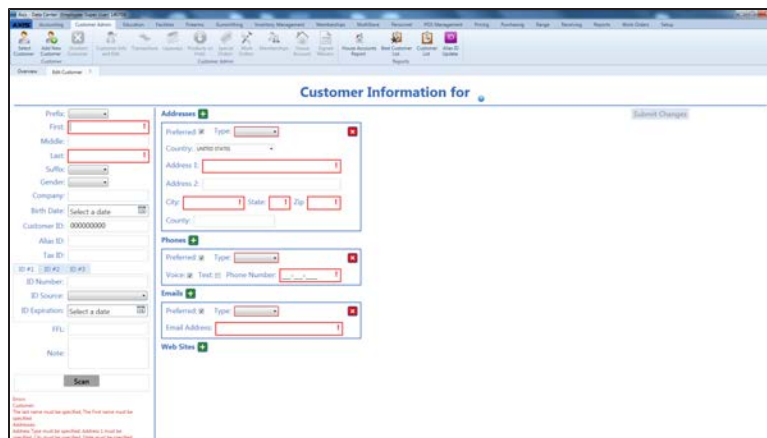
Set Up and Maintain a Customer Record

1. Complete the following procedures as appropriate to maintain customer records:

Add a Customer Record



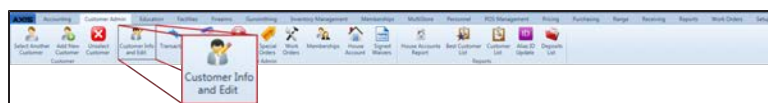
1. Select **Customer Admin > Add New Customer** from the main menu to display a blank **Customer Information for** screen.

A screenshot of the 'Customer Information for' screen. The form is mostly empty, with red boxes highlighting the input fields for First Name, Middle Name, Last Name, Suffix, Gender, Company, Birth Date, Customer ID, Alias ID, Tax ID, ID Number, ID Source, ID Expiration, FFL, Note, Preferred Name, Type, Country, Address 1, Address 2, City, State, Zip, Country, Preferred Name, Type, Voice, Text, Phone Number, Preferred Name, Type, Email Address, and Web Site.

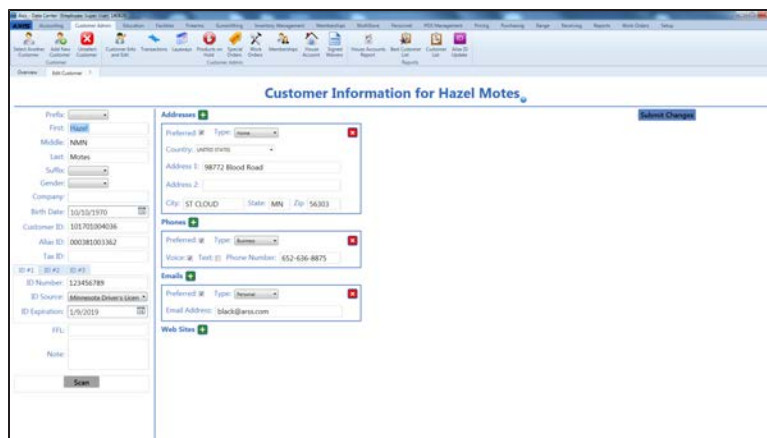
2. Continue with the procedure below.

Edit a Customer Record

1. [Select a Customer \(see page 113\)](#).



2. Select **Customer Admin > Customer Info and Edit** from the main menu to display the customer's **Customer Information for** screen.

A screenshot of the 'Customer Information for Hazel Motes' screen. The form is populated with customer data. Red boxes highlight the input fields for First Name (Hazel), Middle Name (NMN), Last Name (Motes), Suffix, Gender, Company, Birth Date (10/13/1970), Customer ID (10170504036), Alias ID (000381001362), Tax ID, ID Number (123456789), ID Source (Minnesota Drivers License), ID Expiration (5/31/2019), FFL, Note, Preferred Name, Type, Country (United States), Address 1 (98772 Blood Road), Address 2, City (ST CLOUD), State (MN), Zip (56303), Preferred Name, Type, Voice, Text, Phone Number (652-636-8875), Preferred Name, Type, Email Address (hazelm@ana.com), and Web Site.

3. Continue with the procedure below.

2. Enter/edit Customer information on the screen.

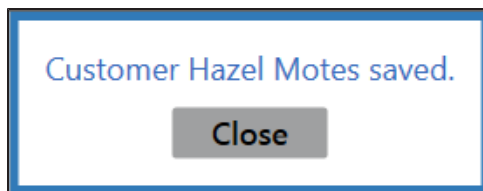
Note: Required fields and settings are displayed with red borders. Some fields may not be present in all situations.

Note: If the customer has a government-issued ID, click the **Scan** button to scan it and automatically fill certain fields.

Prefix	Select a prefix from the drop-down menu.	
First	Enter the customer's first name.	
Middle	Enter the customer's middle name.	
Last	Enter the customer's last name.	
Suffix	Select a suffix from the drop-down menu.	
Gender	Select a gender from the drop-down menu.	
Company	Enter the customer's company name.	
Birth Date	Enter the customer's birth date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.	
Customer ID	The system automatically generates a unique number and assigns it to the customer.	
Alias ID	Enter a unique retailer-generated number per store policy.	
Salesperson	Select the appropriate salesperson from the drop-down menu.	
Tax ID	Enter the customer's unique, government-issued number to designate tax-exempt status for the customer.	
ID #1; ID #2; ID #3	Enter up to three unique ID records. Click a tab to display the fields for that record.	
	ID Number/#	Enter the ID number.
	ID Source	Select the ID source from the drop-down menu.
	ID Expiration	Enter the ID expiration date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
FFL	Enter the customer's FFL number.	
Note	Enter a brief explanatory note about the customer to be displayed at the Register.	
Scan	Click the button to scan the customer's government-issued ID and automatically fill certain fields.	
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Country	Select the country from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.

	Zip	Enter the ZIP code.
	County	Enter the county.
Phones		If a phone record is not needed, click its Close (red X) button to close it. If an additional phone record is needed, click the Add (green +) button to open it.
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails		If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.
Web Sites		If a website record is not needed, click its Close (red X) button to close it. If an additional website record is needed, click the Add (green +) button to open it.
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.

3. Click the **Submit Changes** button to display a confirmation window.

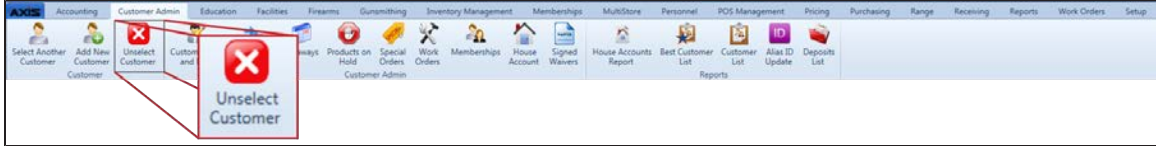


4. Click the **Close** button to close the confirmation window and display the customer's **Overview** of screen.

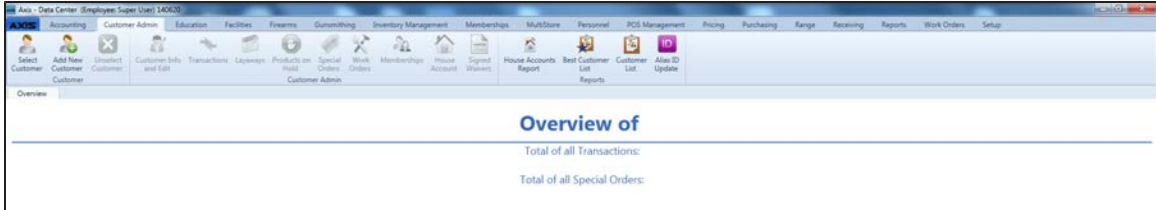


Clear the Currently Selected Customer

1. Click the **Customer Admin** tab to display the Customer Administration ribbon.



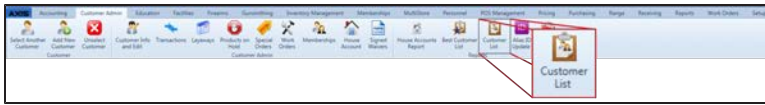
2. Click the **Unselect Customer** button to display a blank **Overview of** screen.



View and Update the Customer List

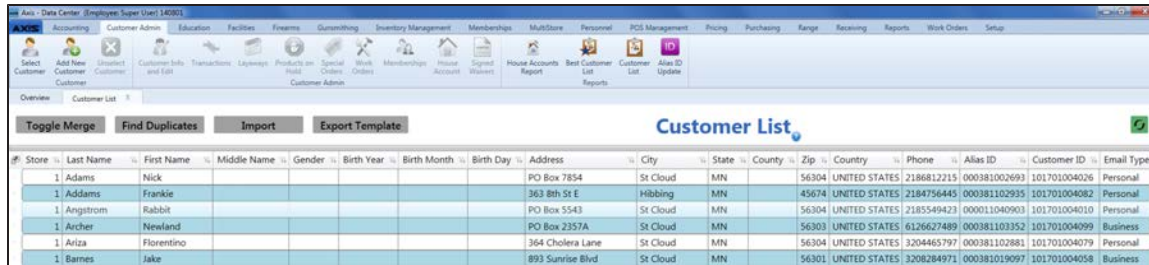
1. Navigate to the **Customer List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Customer Admin > Customer List** from the main menu to display the **Customer List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

A screenshot of the 'Customer List' screen in the software. The screen has a header with 'Customer List' and a search icon. Below the header is a table with columns for Store, Last Name, First Name, Middle Name, Gender, Birth Year, Birth Month, Birth Day, Address, City, State, County, Zip, Country, Phone, Alias ID, Customer ID, and Email Type. The table contains several rows of customer data.

Store	Last Name	First Name	Middle Name	Gender	Birth Year	Birth Month	Birth Day	Address	City	State	County	Zip	Country	Phone	Alias ID	Customer ID	Email Type
1	Adams	Nick						PO Box 7854	St Cloud	MN		56304	UNITED STATES	2186812215	0003811002693	101701004026	Personal
1	Addams	Frankie						363 8th St E	Hibbing	MN		45674	UNITED STATES	2184756443	000381102935	101701004082	Personal
1	Angstrom	Rabbit						PO Box 5543	St Cloud	MN		56304	UNITED STATES	2185549423	000011040903	101701004010	Personal
1	Archer	Newland						PO Box 2357A	St Cloud	MN		56303	UNITED STATES	6126627489	000381103352	101701004099	Business
1	Artza	Florentino						364 Cholera Lane	St Cloud	MN		56304	UNITED STATES	3204465797	000381102881	101701004079	Personal
1	Barnes	Jake						893 Sunrise Blvd	St Cloud	MN		56301	UNITED STATES	3208284971	000381019897	101701004058	Business

2. Complete the following procedures as needed:

- [Import Customer Data \(see page 119\)](#)

Note: Customer data may be imported into the **Customer List** screen by creating, populating, and importing a formatted Excel file.

- [Manage System-Identified Duplicate Customer Records \(see page 121\)](#)

Note: Customer records that contain similar information (as identified by the system) may be merged into a single record or permanently distinguished from each other.

- [Manage Manually Identified Duplicate Customer Records \(see page 126\)](#)

Note: Customer records that contain similar information (as identified by the user) may be merged into a single record or permanently distinguished from each other.

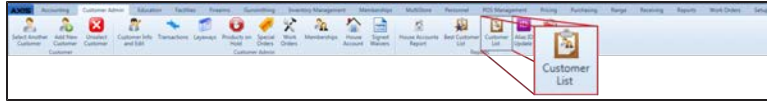
3. Click the tab's **Close** button to close the screen.

Import Customer Data

Complete the following procedure to import customer data into the **Customer List** screen by creating, populating, and importing a formatted Excel file.

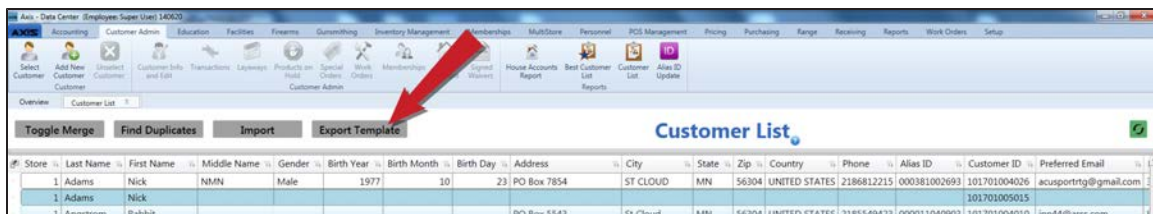
1. Navigate to the **Customer List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

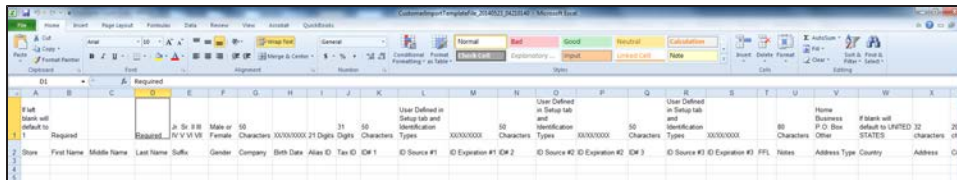


2. Select **Customer Admin > Customer List** from the main menu to display the **Customer List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the **Export Template** button to export the template format to an Excel file.

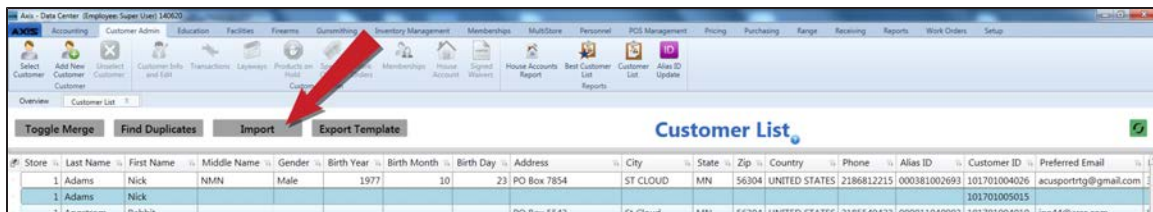


3. Populate the Excel file with customer information.

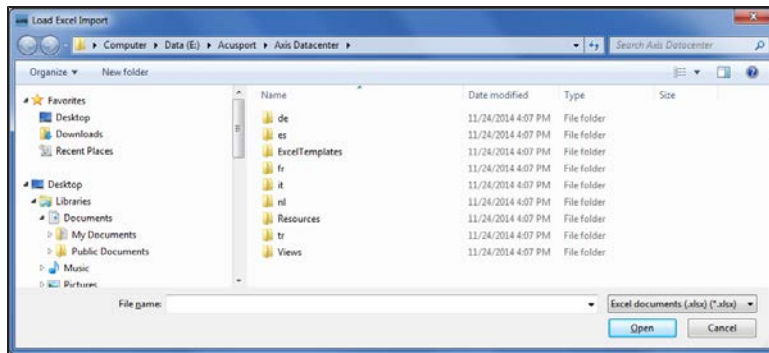
Note: The file must adhere to the validation requirements indicated in row 1 and below:

- **First Name** and **Last Name** are required fields.
- No entry may have the same values for **First Name**, **Last Name**, and **Birth Date** as any other entry in this file or already in the system.
- If the **Email Address** field is populated, the **Email Type** field is required. An entry in the **Email Type** field must exactly match one of the defined email types (**Personal**, **Business**, or **Other**)
- Any entry in one of the **ID Source** columns must exactly match one of the sources defined on the **Identification Types** screen. (Select **Setup > Identification Types** to view this screen.)

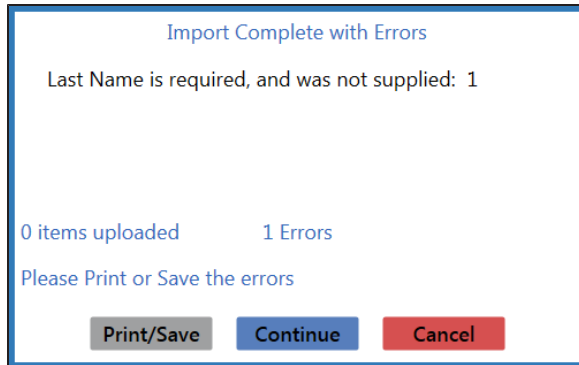
4. Save the Excel file.



5. Click the **Import** button on the **Customer List** screen to display the **Load Excel Import** window.

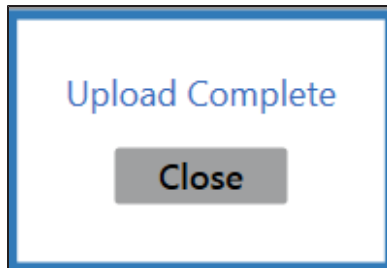


6. Browse to the desired location.
7. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
8. When the import is complete, the system displays the **Upload Complete** window.



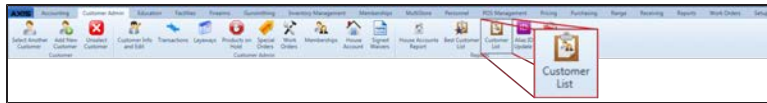
9. Click the **Close** button to close the window.
10. Click the tab's **Close** button to close the screen.

Manage System-Identified Duplicate Customer Records

Complete the following procedure to automatically identify duplicate customer records and either merge them into a single record or permanently distinguish them from each other.

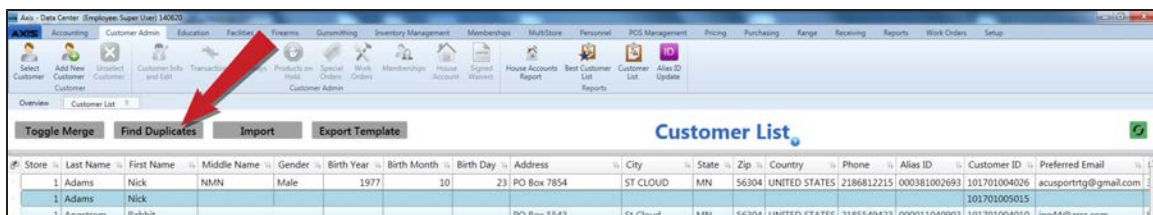
1. Navigate to the **Customer List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

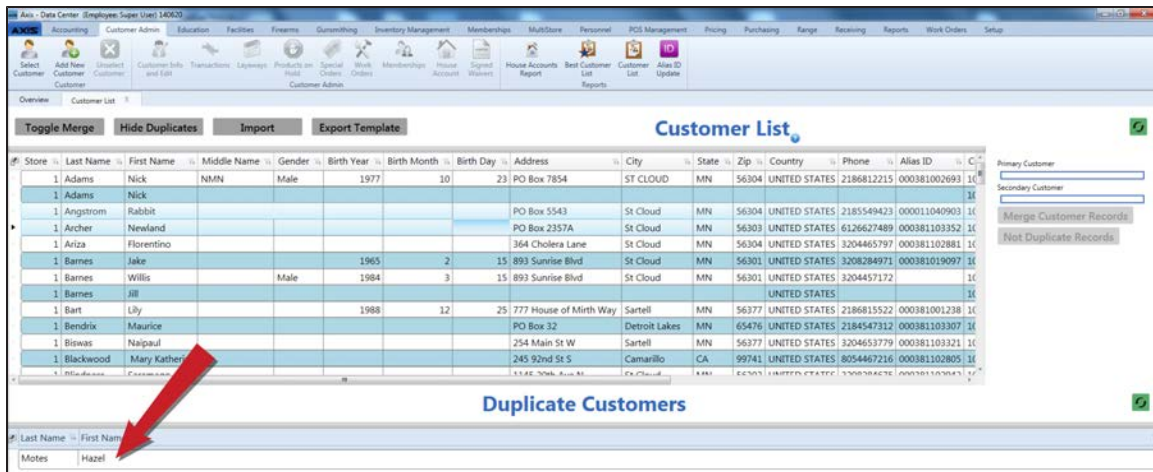


2. Select **Customer Admin > Customer List** from the main menu to display the **Customer List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the **Find Duplicates** button to display the **Duplicate Customers** list.



3. Click a name in the **Duplicate Customers** list to display the duplicate customer records.

Customer List

Store	Last Name	First Name	Middle Name	Gender	Birth Year	Birth Month	Birth Day	Address	City	State	Zip	Country	Phone	Alias ID
1	Adams	Nick	NMN	Male	1977	10	23	PO Box 7854	ST CLOUD	MN	56304	UNITED STATES	2186812215	000381002693
1	Adams	Nick												
1	Angstrom	Rabbit						PO Box 5543	St Cloud	MN	56304	UNITED STATES	2185549423	000011040903
1	Archer	Newland						PO Box 2357A	St Cloud	MN	56303	UNITED STATES	6126627489	000381103352
1	Ariza	Florentino						364 Cholera Lane	St Cloud	MN	56304	UNITED STATES	3204465797	000381102881
1	Barnes	Jake			1965	2	15	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3208284971	000381019097
1	Barnes	Willis		Male	1984	3	15	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3204457172	
1	Barnes	Jill										UNITED STATES		
1	Bart	Lily			1988	12	25	777 House of Mirth Way	Sartell	MN	56377	UNITED STATES	2186815522	000381001238
1	Bendrix	Maurice						PO Box 32	Detroit Lakes	MN	65476	UNITED STATES	2184547312	000381103307
1	Bitwas	Naipaul						254 Main St W	Sartell	MN	56377	UNITED STATES	3204463779	000381103321
1	Blackwood	Mary Katherine						245 92nd St S	Camarillo	CA	99242	UNITED STATES	8054467216	000381102805

Duplicate Customers

Last Name	First Name
Motes	Hazel

Select Primary **Select Secondary**

Name: Hazel NMN Motes
 Birth: 10/10/1970
 Customer ID: 101701004036
 Alias ID: 000381003362
 ID #1: 123456789; Minnesota Driver's License, Exp: 1/9/2019
 98772 Blood Road
 ST CLOUD, MN, 56303

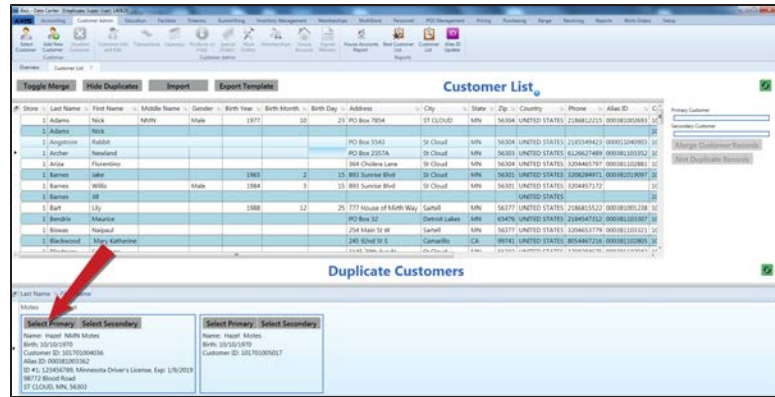
Select Primary **Select Secondary**

Name: Hazel Motes
 Birth: 10/10/1970
 Customer ID: 101701005017

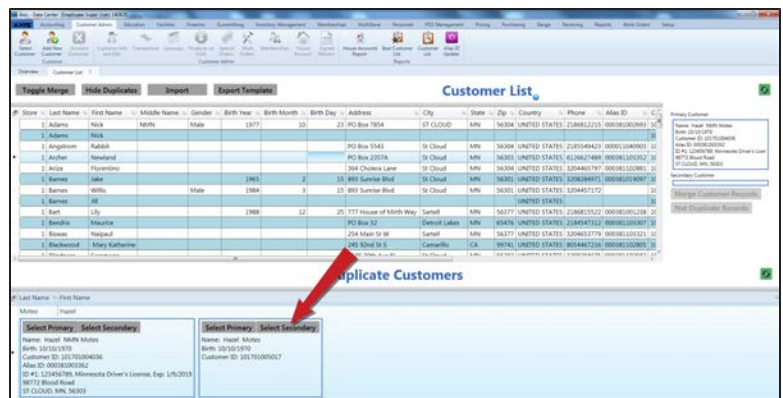
4. Determine the relationship between the displayed customer records:
 - If both records are for the same customer, they may be merged into a single record. One will be the Primary record (to be retained in the customer list) and the other will be the Secondary record (to be merged and removed).
 - If each record is for a different customer, they may be distinguished from each other.
5. Complete the appropriate procedure for the displayed customer records:

Merge Customer Records

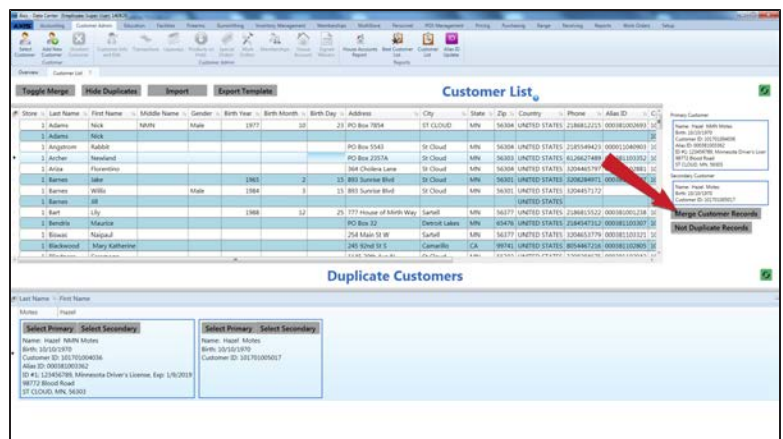
Complete the following procedure to merge two records into a single customer record.



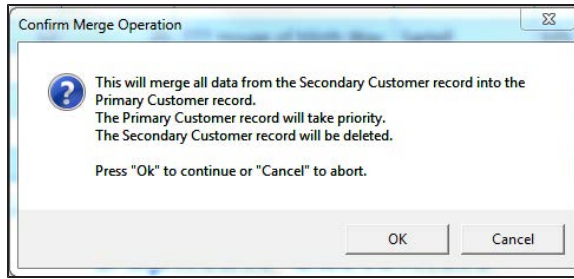
1. Determine which customer record will be retained and click its **Select Primary** button to display the customer information the **Primary Customer** field.



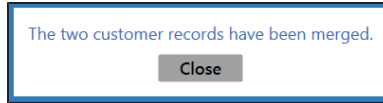
2. Determine which customer record will be merged into the other and click its **Select Secondary** button to display the customer information in the **Secondary Customer** field.



3. Click the **Merge Customer Records** button to display the **Confirm Merge Operation** screen.



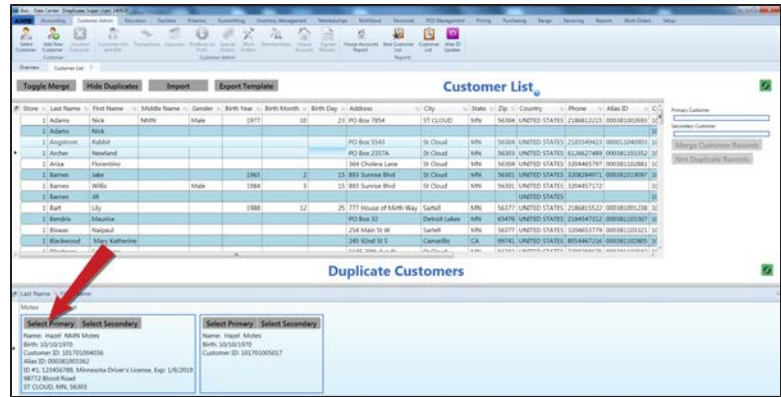
4. Click the **OK** button to display a merge confirmation window.



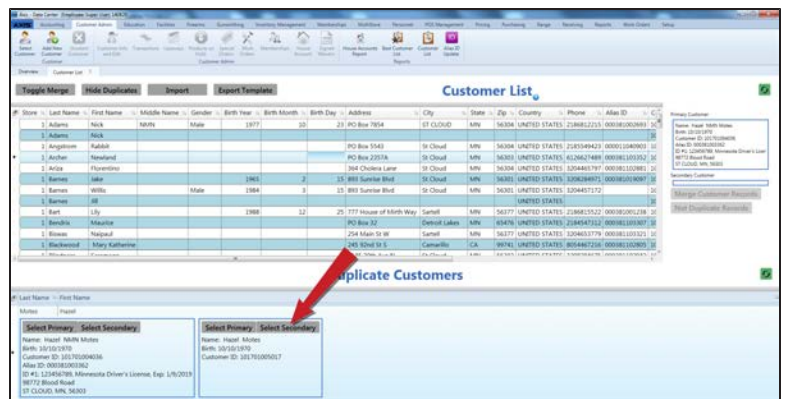
5. Click the **Close** button.
-

Distinguish Customer Records

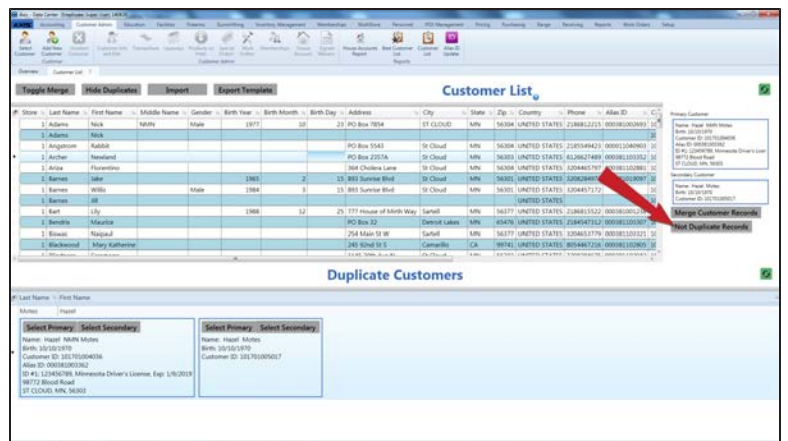
Complete the following procedure to establish two records as distinct customer records.



1. Click a customer record's **Select Primary** button to display its customer information in the **Primary Customer** field.



2. Click the other customer record's **Select Secondary** button to display its customer information in the **Secondary Customer** field.



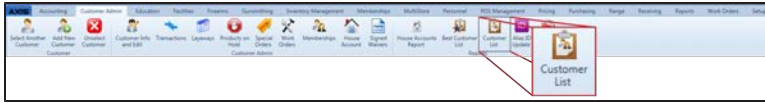
3. Click the **Not Duplicate Records** button.

6. Click the tab's **Close** button to close the screen.

Manage Manually Identified Duplicate Customer Records

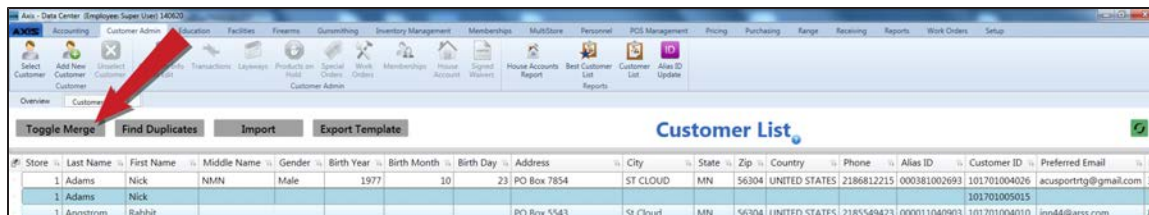
Complete the following procedure to manually identify duplicate customer records and either merge them into a single record or permanently distinguish them from each other.

1. Navigate to the **Customer List** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

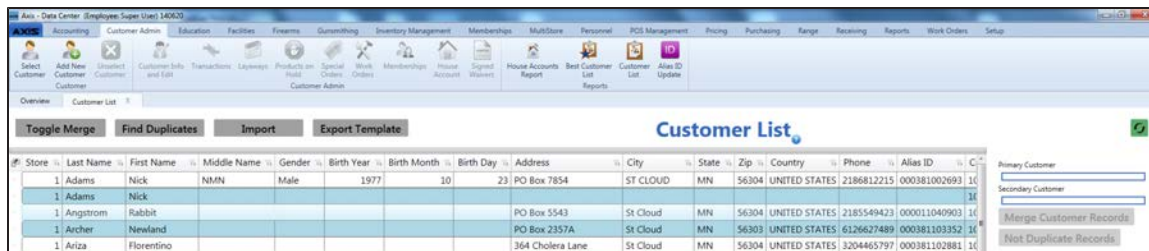


2. Select **Customer Admin > Customer List** from the main menu to display the **Customer List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



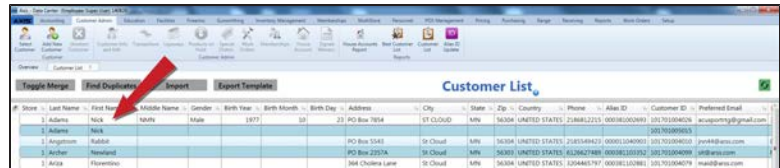
2. Click the **Toggle Merge** button to display merge controls with **Primary Customer** and **Secondary Customer** fields on the right side of the screen.



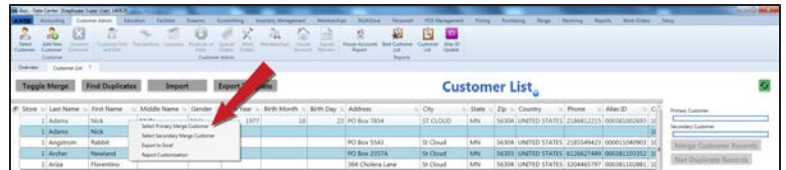
3. Identify two customer records with similar information and determine their relationship:
 - If both records are for the same customer, they may be merged into a single record. One will be the Primary record (to be retained in the customer list) and the other will be the Secondary record (to be merged and removed).
 - If each record is for a different customer, they may be distinguished from each other.
4. Complete the appropriate procedure for the customer records:

Merge Customer Records

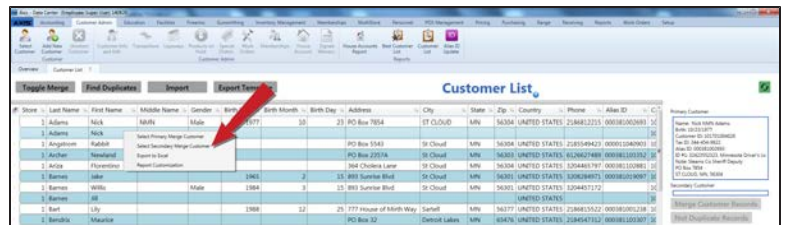
Complete the following procedure to merge two records into a single customer record.



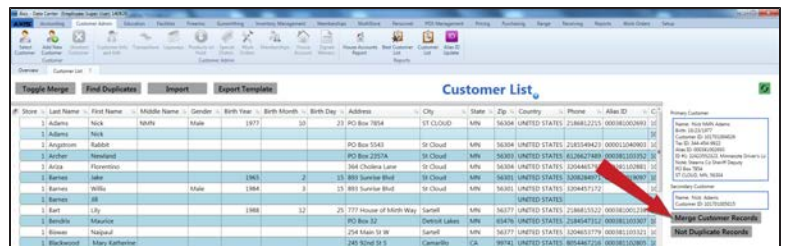
1. Right-click the name of the Primary customer record to display a list of options.



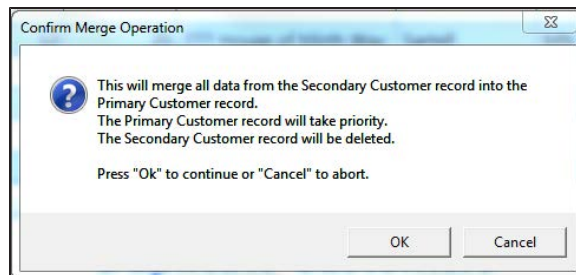
2. Click the **Select Primary Merge Customer** option to add the customer information to the **Primary Customer** field.
3. Right-click the name of the Secondary customer record to display a list of options.



4. Click the **Select Secondary Merge Customer** option to add the customer information to the **Secondary Customer** field.



5. Click the **Merge Customer Records** button to display the **Confirm Merge Operation** screen.



6. Click the **OK** button to display a merge confirmation window.

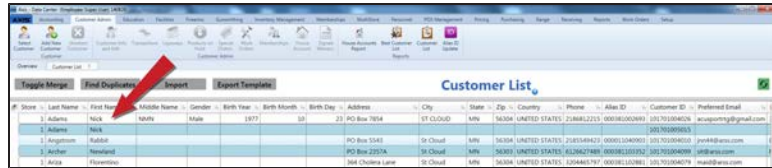
The two customer records have been merged.

Close

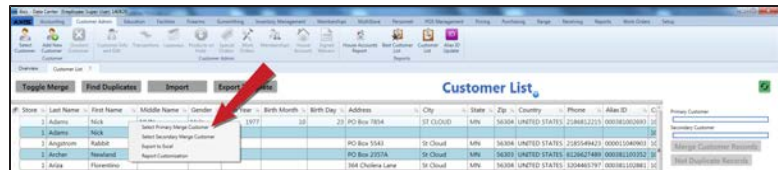
- Click the **Close** button.

Distinguish Customer Records

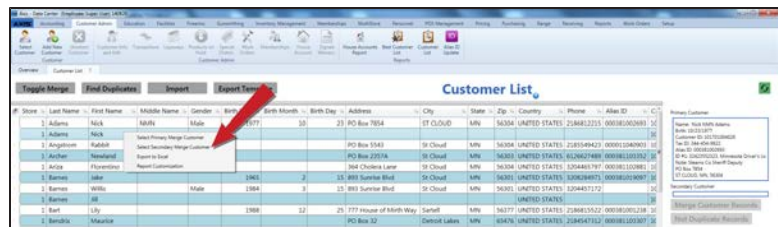
Complete the following procedure to establish two records as distinct customer records.



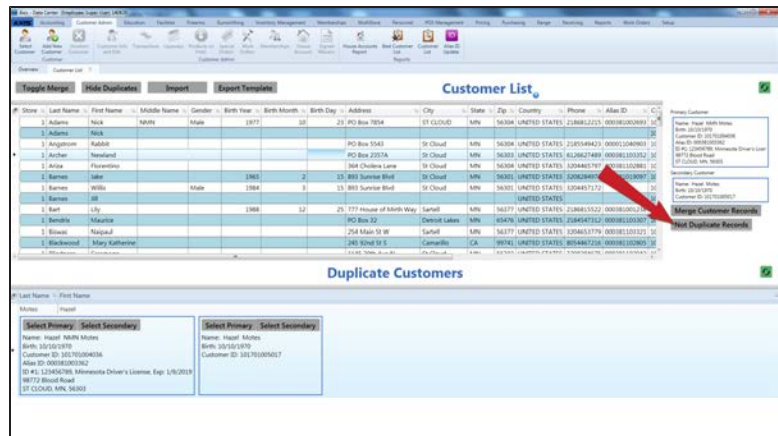
- Right-click one of the customer records to display a list of options.



- Click the **Select Primary Merge Customer** option to add the customer information to the **Primary Customer** field.
- Right-click the other customer record to display a list of options.



- Click the **Select Secondary Merge Customer** option to add the customer information to the **Secondary Customer** field.



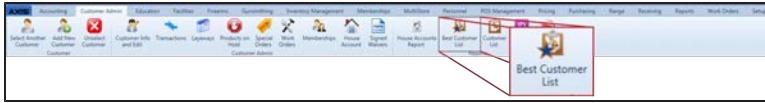
- Click the **Not Duplicate Records** button.

- Click the tab's **Close** button to close the screen.

View the Best Customer List

1. Navigate to the **Best Customer List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Customer Admin > Best Customer List** from the main menu to display the **Best Customer List** screen.

#	Store	Last Name	First Name	Middle Name	Gender	Address	City	State	Zip	Country	Phone	Email	Product Count	Product Sum
1		Adams	Nick	NMN	Male	PO Box 7854	ST CLOUD	MN	56304	UNITED STATES	2186812215	acusportnj@gmail.com	145	\$11,083.99
1		Anonymous											14	\$5,520.00
1		Christensen	Mathew		Male	4477 Clearview Dr	Saint Cloud	MN	56303	UNITED STATES	3202258191	crazy@yahoo.com	8	\$4,240.00
1		Motes	Hazel	NMN		98772 Blood Road	ST CLOUD	MN	56303	UNITED STATES	6526368875	black@arss.com	11	\$4,093.28
1		Knapp	Drew	rsmn		123 Test	SAINT CLOUD	MN	55555	UNITED STATES	1234567890		5	\$3,430.00
1		Matthews	Nick		Male	5345 Pine St	Sauk Rapids	MN	55432	UNITED STATES	5435345556		6	\$1,769.00
1		Dalloway	Clarissa			43233 Woolf Way	Waite Park	MN	56384	UNITED STATES	7015426653	op3@arss.com	7	\$1,260.00
1		Bradwast	Jordan		Male	65 Main Street	Foley	MN	56377	UNITED STATES	3202602619		2	\$610.00
1		Barnes	Jake			893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3208284971	account@arss.com	15	\$469.00
1		de Saint-Exupery	Prince			8353 Antoine Dr	St Cloud	MN	56301	UNITED STATES	3208879764	ttw@arss.com	1	\$65.00
1		Hemingway	Santiago			247 Ernest Way	Waubun	MN	65747	UNITED STATES	2185579467	hew@arss.com	3	\$61.00
1		Bloom	Molly		Male	885146 Joyce Rd	Waite Park	MN	54755	UNITED STATES	3209547753	ddfgar@arss.com	13	\$54.99
1		Motes	Jerry			112 Main Street	St Cloud	MN	56303	UNITED STATES	5152524512		35	\$52.50
1		Pedersen	Jake	NMN		123 That Street	CITY	MN	12345	UNITED STATES	1234567890		1	\$30.00
1		O'Hara	Kimball			PO Box 287	Sartell	MN	56377	UNITED STATES	6126364457	stand@arss.com	1	\$30.00
1		Ellison	Ralph			5552 Invisible Rd	Sauk Rapids	MN	56379	UNITED STATES	3208285547	ertgdf@arss.com	1	\$0.00

2. If needed, complete the following procedure to modify the contents displayed in the list:

1. Complete any of these procedures to set list criteria:
 - Select the desired department(s) from the **Selected Departments** drop-down field.
 - Enter starting and ending dates in the **Date Range** fields to display results from that time frame.
 - Enter the preferred number of results in the **Record Count** field to limit the list length.
2. Click the **Update** button to display the updated list.

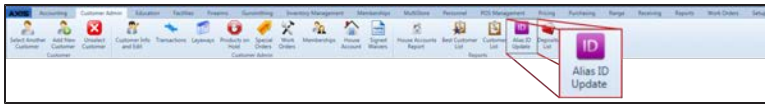
Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Click the tab's **Close** button to close the screen.

View and Update the Customer Alias ID List

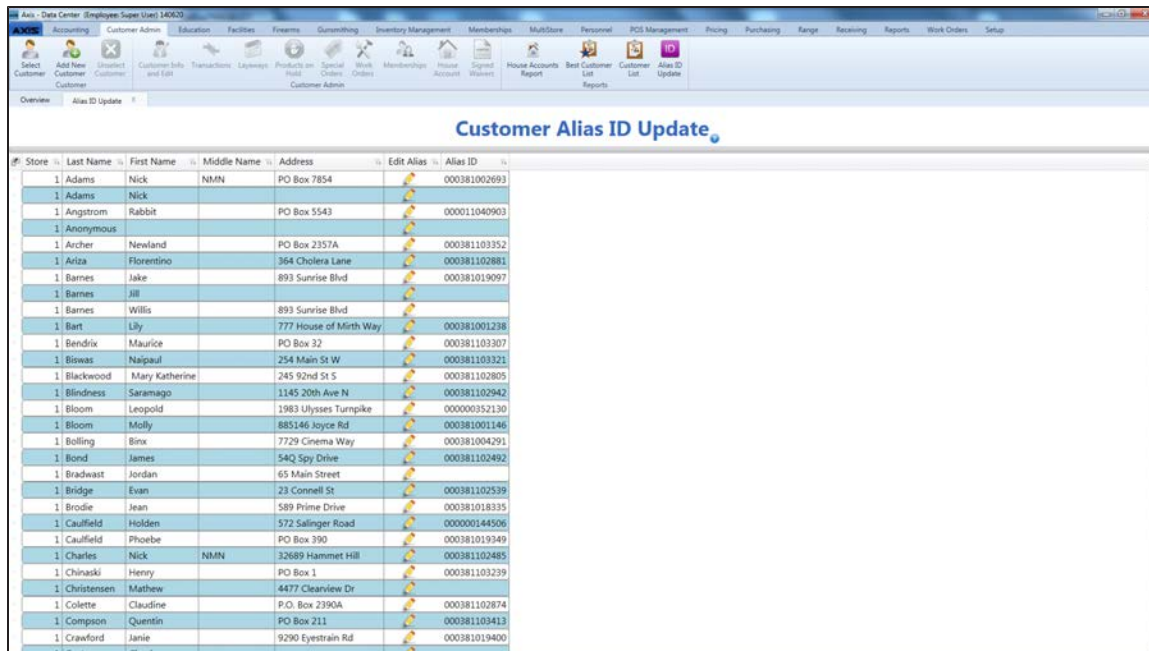
1. Navigate to the **Customer Alias ID Update** screen.

1. [Log In to the Data Center Application](#) (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Customer Admin > Alias ID Update** from the main menu to display the **Customer Alias ID Update** screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).



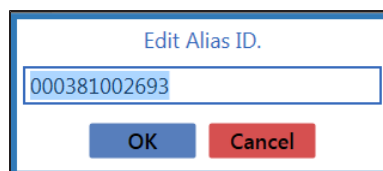
Store	Last Name	First Name	Middle Name	Address	Edit Alias	Alias ID
1	Adams	Nick	NMN	PO Box 7854		000381002693
1	Adams	Nick				
1	Angstrom	Rabbit		PO Box 5543		000011040903
1	Anonymous					
1	Archer	Newland		PO Box 2357A		000381103352
1	Ariza	Florentino		364 Cholera Lane		000381102881
1	Barnes	Jake		893 Sunrise Blvd		000381019097
1	Barnes	Jill				
1	Barnes	Willis		893 Sunrise Blvd		
1	Bart	Lily		777 House of Mirth Way		000381001238
1	Bendrix	Maurize		PO Box 32		000381103307
1	Biowas	Naipaul		254 Main St W		000381103321
1	Blackwood	Mary Katherine		245 92nd St S		000381102805
1	Blindness	Saramago		1145 20th Ave N		000381102942
1	Bloom	Leopold		1983 Ulysses Turnpike		000000352130
1	Bloom	Molly		885146 Joyce Rd		000381001146
1	Bolling	Binx		7729 Cinema Way		000381004291
1	Bond	James		54Q Spy Drive		000381102492
1	Bradwast	Jordan		65 Main Street		
1	Bridge	Evan		23 Connell St		000381102539
1	Brodie	Jean		589 Prime Drive		000381018335
1	Caulfield	Holden		572 Salinge Road		000000144506
1	Caulfield	Phoebe		PO Box 390		000381019349
1	Charles	Nick	NMN	32689 Hammet Hill		000381102485
1	Chinaski	Henry		PO Box 1		000381103239
1	Christensen	Mathew		4477 Clearview Dr		
1	Colette	Claudine		P.O. Box 2390A		000381102874
1	Compson	Quentin		PO Box 211		000381103413
1	Crawford	Janie		9290 Eyestrain Rd		000381019400
1	Customer	Clark				

2. Complete the following procedure as needed:

Create/Edit an Alias ID



1. Click a customer's **Edit Alias ID** button to display the **Edit Alias ID** window.



Dialog box titled "Edit Alias ID." containing a text input field with the value "000381002693" and two buttons: "OK" and "Cancel".

2. Enter a new alias ID in the field.
3. Click the **OK** button to close the **Edit Alias ID** window and display the new alias ID in the customer's record.

3. Click the tab's **Close** button to close the screen.

Set Up and Edit a Customer's House Account

1. Navigate to the customer's **House Account** for screen.

1. Select a Customer (see page 113).



2. Select **Customer Admin > House Account** from the main menu to display the customer's **House Account** for screen.

Note: If the customer does not have a house account, the screen will display as shown below.



2. Complete the following procedures as appropriate to manage house accounts:

Create a House Account



1. Click the **Create Account** button to display an account limit entry window.

A dialog box titled 'Enter Account Limit for new Account'. It contains a text input field with '\$0.00' entered. Below the field are two buttons: 'Ok' and 'Cancel'.

2. Enter an account limit amount in the field.
3. Click the **OK** button to close the account limit entry window and display the new house account on the customer's **House Account for** screen.



Edit the House Account Limit

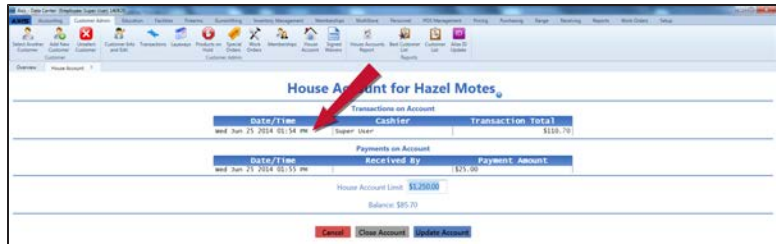


1. Enter a new account limit amount in the **House Account Limit** field.
2. Click the **Update Account** button to display an update confirmation window.

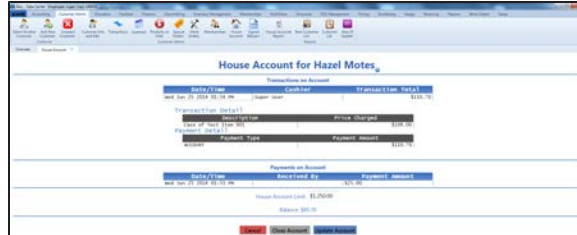
A confirmation dialog box with the text 'Account Limit was updated to \$1,250.00.' and a 'Close' button.

3. Click the **Close** button to remove the confirmation window.

View a House Account Transaction's Details



1. Click a transaction to display its **Transaction Detail** and **Payment Detail** record.



2. Double-click the record to close it.

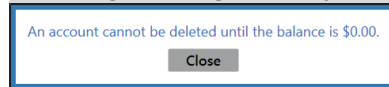
Close a House Account

Note: If a house account has an outstanding balance, it cannot be closed.

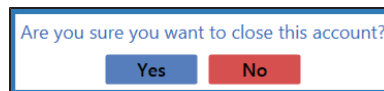


1. Click the **Close Account** button to display an update confirmation window.

Note: If the house account has an outstanding balance, the following message displays:



Have the customer pay off the account before attempting to close the account.



2. Click the **Yes** button to close the confirmation window and display a blank **House Account for** screen.

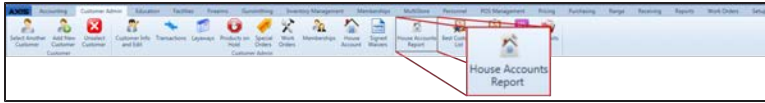


3. Click the tab's **Close** button to close the screen.

View the House Accounts Report

1. Navigate to the **House Accounts Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Customer Admin > House Accounts Report** from the main menu to display the **House Accounts Report** screen.

A screenshot of the 'House Accounts Report' screen. The screen title is 'House Accounts Report' with a green checkmark icon. Below the title is a checkbox labeled 'Include Zero Balances' which is checked. The main content is a table with the following columns: #, Store, Last Name, First Name, Middle Name, Date Established, Credit Limit, Current Balance, Date Last Payment, and Days Since Last Payment. The table contains four rows of data. At the bottom of the table, it says 'Sum = 50,908.70'.

#	Store	Last Name	First Name	Middle Name	Date Established	Credit Limit	Current Balance	Date Last Payment	Days Since Last Payment
1		Adams	Nick	NMN	10/21/2013	\$1,000.00	\$0.00		
1		Motes	Hazel	NMN	06/25/2014	\$1,250.00	\$85.70	06/25/2014	0
1		Shoot Straight Master	Shoot Straight Tampa, INC		05/15/2013	\$10,000,000.00	\$29,075.00		
1		Shoot Straight Master	Shoot Straight, INC		05/15/2013	\$10,000,000.00	\$21,748.00		

2. If desired, check the **Include Zero Balances** checkbox to display all house accounts.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

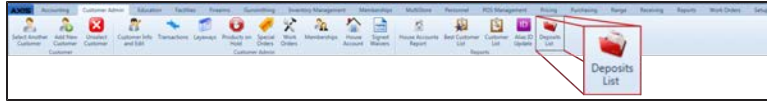
3. Click the tab's **Close** button to close the screen.

View the Deposits List

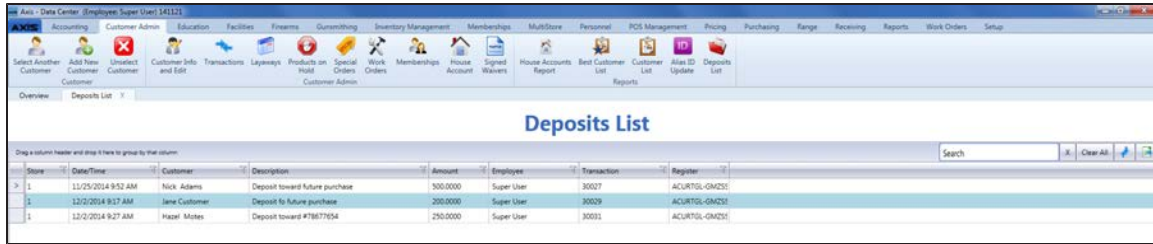
Complete the following procedure to view all active deposits. (The **Deposits List** screen does not display redeemed deposits.)

1. Navigate to the **Deposits List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Customer Admin > Deposits List** from the main menu to display the **Deposits List** screen.

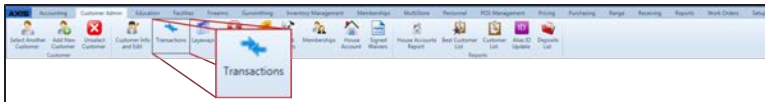


2. If needed, [Sort and Filter Reporting Screen Data \(see page 44\)](#).
3. Click the tab's **Close** button to close the screen.

View and Use a Customer's Transactions History

1. Navigate to the customer's **Transactions** for screen.

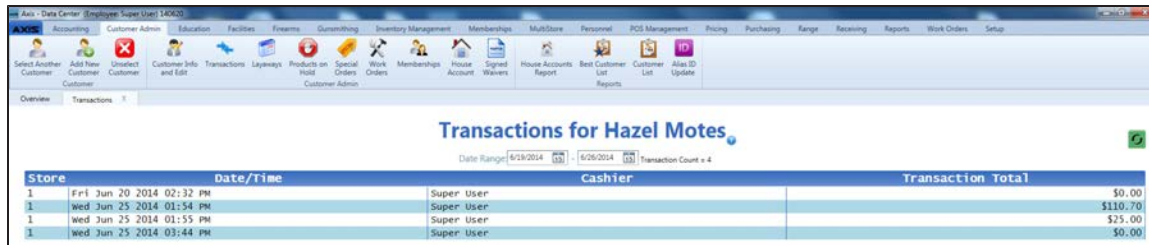
1. Select a Customer (see page 113).



2. Select **Customer Admin > Transactions** from the main menu to display the customer's **Transactions for** screen.

3. Enter starting and ending dates in the **Date Range** fields to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

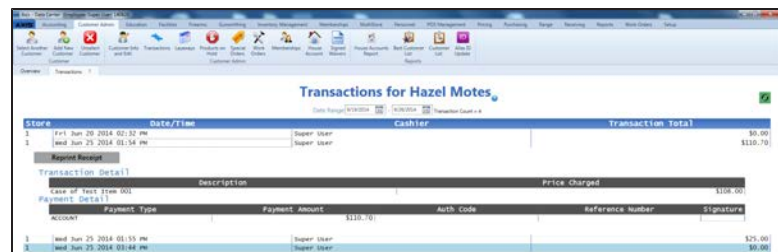


2. Complete the following procedures as appropriate to manage the customer's transactions:

View a Transaction's Details

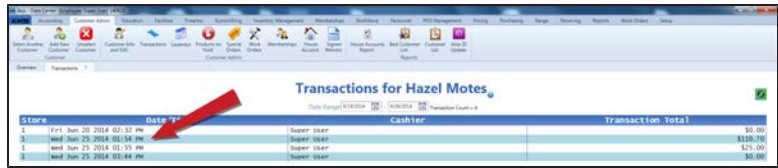


1. Click a transaction to display its **Transaction Detail** record.

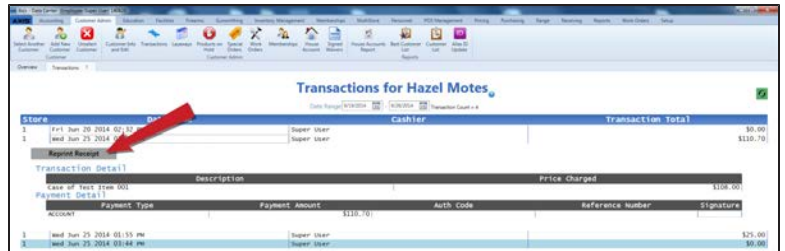


2. Double-click the record to close it.

Reprint a Transaction's Receipt



1. Click a transaction to display its **Transaction Detail** record.

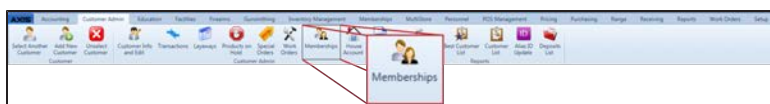


2. Click the **Reprint Receipt** button to display an electronic copy (PDF format) of the receipt.
 3. Select the **File > Save As** option from the menu bar to display the **Save As** window.
 4. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the receipt.
 5. Double-click the record to close it.
3. Click the tab's **Close** button to close the screen.

View and Update a Customer's Memberships

1. Navigate to the customer's **Memberships for** screen.

1. Select a Customer (see page 113).



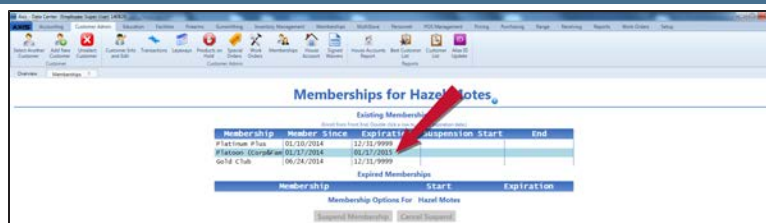
2. Select **Customer Admin > Memberships** from the main menu to display the customer's **Memberships for** screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

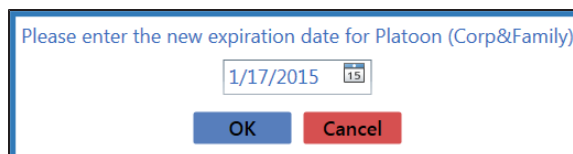


2. Complete the following procedures as appropriate to manage the customer's memberships:

Update a Membership Expiration Date

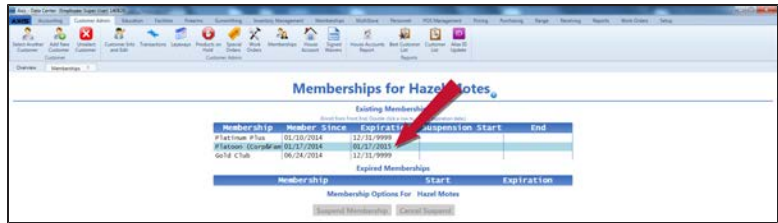


1. Double-click a membership to display its expiration date entry window.

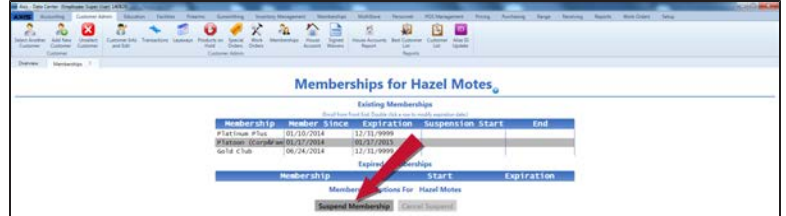


2. Enter a new expiration date in the field (mm/dd/yyyy) or [Select a Date](#) (see page 24) with the calendar button.
3. Click the **OK** button to close the date entry window.

Suspend a Membership



1. Click a membership to select it.



2. Click the **Suspend Membership** button to display the **Suspend Membership** window.

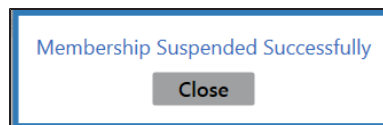
Suspend Membership

Please Select Dates to Suspend Membership:

Start:

End:

3. Enter the suspension period start date in the **Start** field (mm/dd/yyyy) or [Select a Date](#) (see page 24) with the calendar button.
4. Enter the suspension period end date in the **End** field (mm/dd/yyyy) or [Select a Date](#) (see page 24) with the calendar button.
5. Click the **Submit** button to display a suspension confirmation window.



6. Click the **Close** button to close the window and display the membership's suspension dates on the **Memberships for** screen.



Reactivate a Suspended Membership



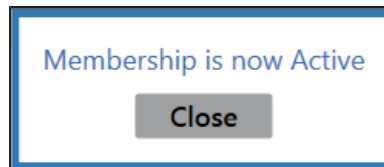
1. Click a suspended membership to select it.



2. Click the **Cancel Suspend** button to display a cancellation confirmation window.



3. Click the **Yes** button to display a reactivation confirmation window.



4. Click the **Close** button to close the window and remove the membership's suspension dates from the **Memberships for** screen.

3. Click the tab's **Close** button to close the screen.

View and Print a Customer's Signed Waivers

1. Navigate to the customer's **Signed Waivers for** screen.

1. Select a Customer (see page 113).



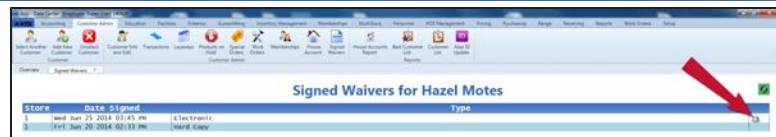
2. Select **Customer Admin > Signed Waivers** from the main menu to display the customer's **Signed Waivers for** screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

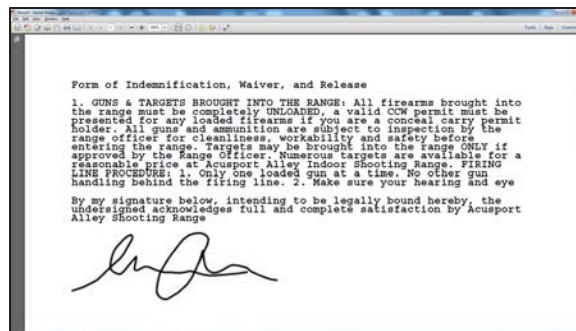


2. Complete the following procedure as appropriate:

Print a Waiver



1. Click a waiver's **Print Waiver** button to display an electronic copy (PDF format) of the waiver.



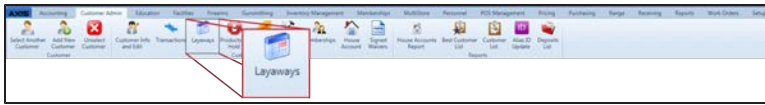
2. Select the **File > Save As** option from the menu bar to display the **Save As** window.

3. [Save and Print a Document](#) (see page 48) to create electronic and hardcopy versions of the waiver.

3. Click the tab's **Close** button to close the screen.

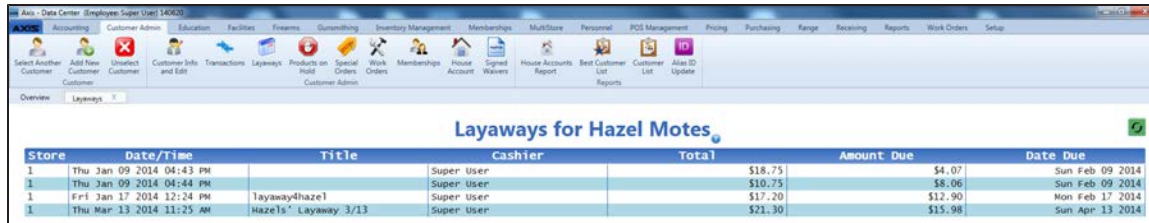
View a Customer's Layaways

1. Navigate to the customer's **Layaways** for screen.
 1. Select a Customer (see page 113).



2. Select **Customer Admin > Layaways** from the main menu to display the customer's **Layaways for** screen.

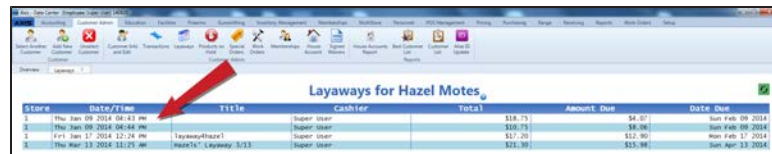
Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).



Store	Date/Time	Title	Cashier	Total	Amount Due	Date Due
1	Thu Jan 09 2014 04:43 PM		Super User	\$18.75	\$4.07	Sun Feb 09 2014
1	Thu Jan 09 2014 04:44 PM		Super User	\$10.75	\$8.06	Sun Feb 09 2014
1	Fri Jan 17 2014 12:24 PM	Layaway4haze1	Super User	\$17.20	\$12.90	Mon Feb 17 2014
1	Thu Mar 13 2014 11:25 AM	Hazels' Layaway 3/13	Super User	\$21.30	\$15.98	Sun Apr 13 2014

2. Complete the following procedure as appropriate:

View a Layaway's Details



Store	Date/Time	Title	Cashier	Total	Amount Due	Date Due
1	Thu Jan 09 2014 04:43 PM		Super User	\$18.75	\$4.07	Sun Feb 09 2014
1	Thu Jan 09 2014 04:44 PM		Super User	\$10.75	\$8.06	Sun Feb 09 2014
1	Fri Jan 17 2014 12:24 PM	Layaway4haze1	Super User	\$17.20	\$12.90	Mon Feb 17 2014
1	Thu Mar 13 2014 11:25 AM	Hazels' Layaway 3/13	Super User	\$21.30	\$15.98	Sun Apr 13 2014

1. Click a layaway to display its **Layaway Detail** record.



Store	Date/Time	Title	Cashier	Total	Amount Due	Date Due
1	Thu Jan 09 2014 04:43 PM		Super User	\$18.75	\$4.07	Sun Feb 09 2014
1	Thu Jan 09 2014 04:44 PM		Super User	\$10.75	\$8.06	Sun Feb 09 2014
1	Fri Jan 17 2014 12:24 PM	Layaway4haze1	Super User	\$17.20	\$12.90	Mon Feb 17 2014
1	Thu Mar 13 2014 11:25 AM	Hazels' Layaway 3/13	Super User	\$21.30	\$15.98	Sun Apr 13 2014

2. Double-click the record to close it.

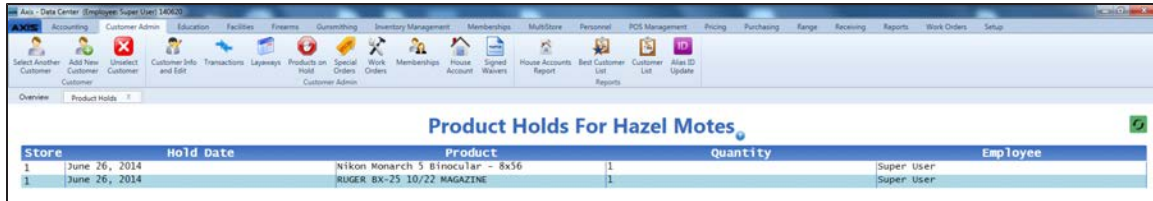
3. Click the tab's **Close** button to close the screen.

View a Customer's Product Holds

1. Navigate to the customer's **Product Holds for** screen.
 1. Select a Customer (see page 113).



2. Select **Customer Admin > Products on Hold** from the main menu to display the customer's **Product Holds for** screen.

A screenshot of the 'Product Holds For Hazel Motes' screen. The screen title is 'Product Holds For Hazel Motes'. Below the title is a table with the following data:

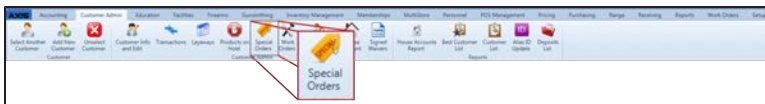
Store	Hold Date	Product	Quantity	Employee
1	June 26, 2014	Nikon Monarch 5 Binocular - 8x56	1	Super User
1	June 26, 2014	RUGER 8X-25 10/22 MAGAZINE	1	Super User

2. Click the tab's **Close** button to close the screen.

View and Update a Customer's Special Orders

1. Navigate to the customer's **Special Orders** for screen.

1. Select a **Customer** (see page 113).



2. Select **Customer Admin > Special Orders** from the main menu to display the customer's **Special Orders** for screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

Store	Date/Time	Cashier	Total	Amount Due	Notes
1	Thu Jan 09 2014 04:46 PM	Super User	\$0.42	\$0.32	
1	Thu Jan 09 2014 04:46 PM	Super User	\$1.07	\$0.68	
1	wed Mar 26 2014 10:54 AM	Super User	\$899.97	\$674.98	

2. Complete the following procedures as appropriate to manage the customer's special orders:

View a Special Order's Details



1. Click a special order to display its **Special Order Detail** record.

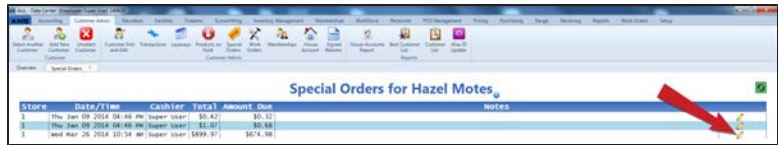
Store	Date/Time	Cashier	Total	Amount Due	Notes
1	Thu Jan 09 2014 04:46 PM	Super User	\$0.42	\$0.32	
1	Thu Jan 09 2014 04:46 PM	Super User	\$1.07	\$0.68	
1	wed Mar 26 2014 10:54 AM	Super User	\$899.97	\$674.98	

Special Order Detail			
Description	Cost	Item Received	Item Delivered
SKU 83 020 3 3m 4 Foc 13	\$899.97	0	0

Payment Detail	
Payment Date	Payment Amount
wed mar 26 2014 10:54 AM	\$674.98

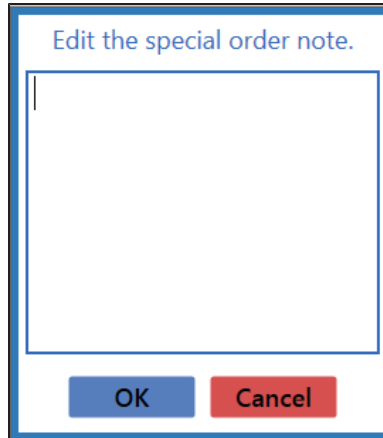
2. Double-click the record to close it.

Edit a Special Order's Note



Order	Date/Time	Cashier	Total	Amount Due	Notes
1	Thu Jan 09 2014 04:46 PM	Super User	\$0.42	\$0.52	
1	Thu Jan 09 2014 04:46 PM	Super User	\$1.07	\$0.88	
1	Wed Mar 26 2014 10:18 AM	Super User	\$479.71	\$479.88	

1. Click a special order's **Edit** button to display a note entry window.



Edit the special order note.

OK Cancel

2. Enter/edit text in the field.
 3. Click the **OK** button to close the window and add the new/revised text in the special order's **Notes** field.
 4. Double-click the **Special Order Detail** record to close it.
3. Click the tab's **Close** button to close the screen.

View a Customer's Completed Work Orders

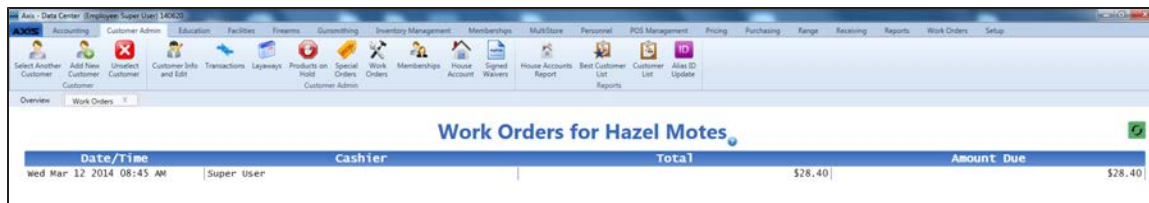
1. Navigate to the customer's **Work Orders** for screen.

1. Select a Customer (see page 113).



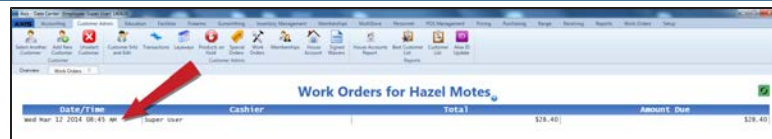
2. Select **Customer Admin > Work Orders** from the main menu to display the customer's **Work Orders** for screen.

Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).

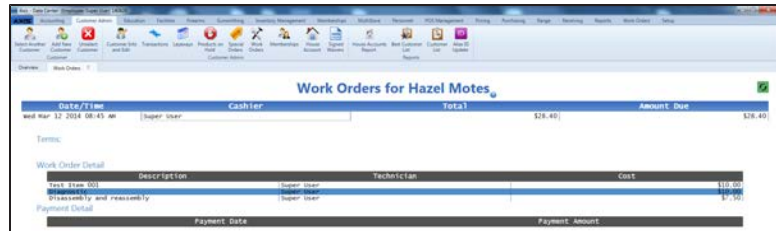


2. Complete the following procedure as appropriate:

View a Work Order's Details



1. Click a work order to display its **Work Order Detail** record.



2. Double-click the record to close it.

3. Click the tab's **Close** button to close the screen.

Inventory Management

This section contains procedures to set up, edit, and maintain products, product kits, license products, attributes, alias UPCs, and Quick Pick categories as well as procedures to apply taxes, print labels, set temporary min/max values, deactivate products, and reconcile inventory data with physical counts.

Product Information

Product Information includes a product's UPC, descriptions, statuses, identifiers, ordering data, prices, taxes, attribute/descriptor combinations, and associated images.

- [Manage Product Information \(see page 149\)](#)

Inventory Data File Import

Inventory Data File Import simplifies the process of entering new items into the system by importing the data directly from an Excel file.

- [Import Inventory Item Data \(see page 160\)](#)

Quick Picks

The Quick Picks feature provides a category-limited, image-based method for selecting products in the **Register** application. This feature is especially useful for items that are difficult to tag (e.g., bait, targets, etc.).

- [Manage Quick Pick Categories \(see page 162\)](#)

Min/Max Levels

Min/Max Levels help ensure items are ordered and received efficiently to avoid out-of-stock and overstock situations.

- [Manage a Product's Min/Max Levels \(see page 165\)](#)
- [Import Min/Max Levels \(see page 168\)](#)

Seasonal Min/Max Settings

Seasonal Min/Max Settings temporarily set minimum and maximum inventory values (used with Auto Ordering) for selected items for a defined period of time.

- [Manage Seasonal Min/Max Values \(see page 170\)](#)

Taxes

- [Update Tax Types for a Product \(see page 173\)](#)

Product Kits

Product Kits are collections of individual products grouped together and sold as a single product.

- [Manage Product Kits \(see page 174\)](#)

Non-Stock Items

Non-Stock Items are items that are not physically stocked in inventory.

- [View and Edit Non-Stock Items \(see page 179\)](#)

License Products Information

License Product Information includes the UPC, descriptions, price, vendor, and mandatory attributes for each license (i.e., hunting) sold through the store.

- [Manage License Types \(see page 180\)](#)

Attributes and Descriptors

An Attribute is a broad category by which products may be identified and sorted. A Descriptor is a specific value within an Attribute category that can be assigned to similar products to distinguish them from others.

- [Manage Mandatory Attributes \(see page 91\)](#)
- [View Descriptor Values for Mandatory Attributes \(see page 182\)](#)
- [Assign a Mandatory Attribute to a Group of Products \(see page 183\)](#)
- [Assign an Attribute to a Group of Products \(see page 185\)](#)

Serial Item (Non-Firearm) List

The Serial Item (Non-Firearm) List displays all serialized, non-firearm items including the acquisition date, UPC, description, manufacturer, department, serial number, vendor, and, if applicable, the buyer and date sold for each.

- [View the Serial Number Report \(see page 187\)](#)

Physical Inventory Stocktaking Counts

Physical Inventory Counts provide a means of reconciling Quantity on Hand values with actual, physical inventory in the store/warehouse through counting and identifying discrepancies.

- [Perform a Physical Inventory Count for Non-Firearm Items \(see page 188\)](#)
- [Import Inventory Stocktaking Data \(see page 193\)](#)
- [Perform a Physical Inventory Count for Firearms \(see page 250\)](#)
- [View the Group History Report \(see page 198\)](#)
- [View the Product Stock Adjustment Report \(see page 200\)](#)

Manage Product Information

1. Navigate to the **Product Maintenance** screen.

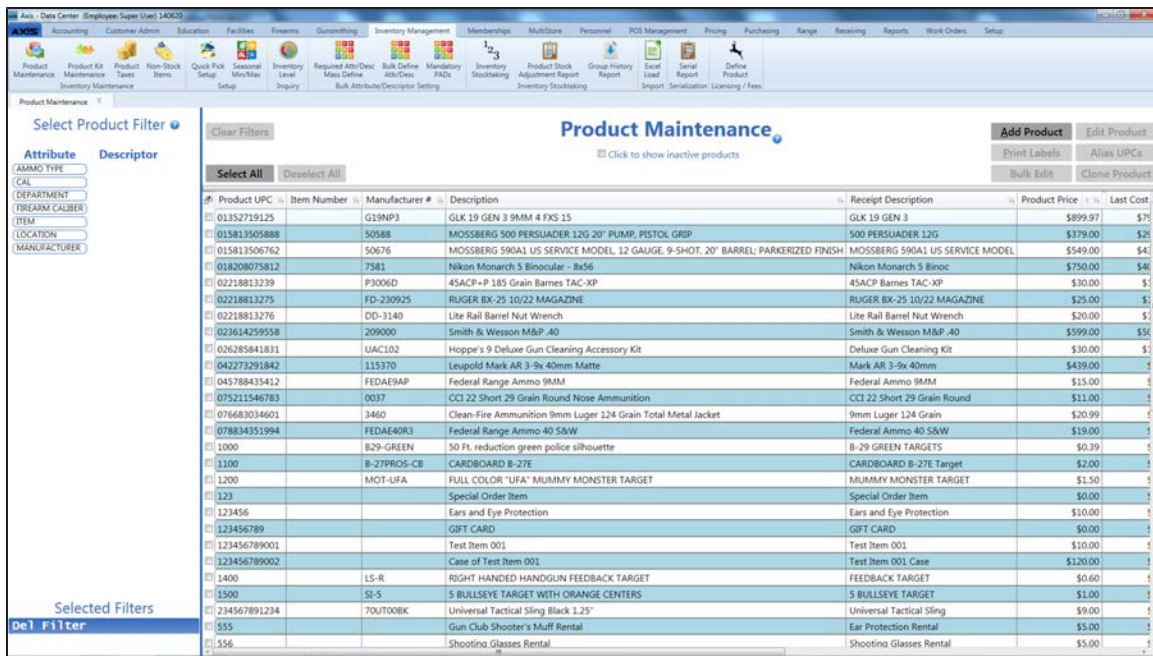
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

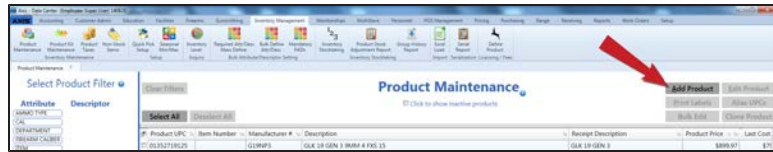
3. Select onscreen options to determine what products are displayed on the screen:

- Check the **Click to show inactive products** checkbox to display all active and inactive products.
- Click an **Attribute** button and one of its associated **Descriptor** buttons to display only matching products. (Repeat as needed to further restrict products with additional attributes and descriptors.)
- Click the **Delete** button beside an attribute/descriptor combination to remove them.
- Click the **Clear** button to remove all attribute/descriptor combinations.



2. Complete the following procedures as needed to manage product information:

Add a Product



1. Click the **Add Product** button to display a blank **Product Edit** window.
2. Continue with the procedure below.

Clone a Product

1. Check a product's checkbox to select it.



2. Click the **Clone Product** button to display a copy of the product's **Product Edit** window.
3. Enter the UPC for the new (clone) product in the **UPC** field.
4. Continue with the procedure below.

Edit a Product

1. Check a product's checkbox to select it.



2. Click the **Edit Product** button to display the product's **Product Edit** window.
3. Continue with the procedure below.

Bulk Edit a Group of Products

1. Check a product's checkbox to select it. (Repeat as needed to select additional products, or click the **Select All** button to select all products on the screen.)



2. Click the **Bulk Edit** button to display the **Bulk Edit Products** window.

The 'Bulk Edit Products' window displays the following options:

- Update ... To selected New Value
- Active to = Active
- Auto-Order to = NNone - All ordering for the item is manual.
- Serialized Non-Firearm to = Inactive

Select tax types for the selected products. Those checked will be added, else deleted.

Check to include tax edits in this edit. Uncheck to ignore tax edits.

Tax Name	Include/Exclude
STATE TAX	<input checked="" type="checkbox"/>
COUNTY TAX	<input checked="" type="checkbox"/>
FIREARMS TAX	<input type="checkbox"/>

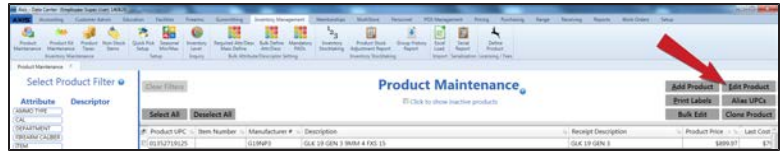
Buttons: Cancel, Submit

3. Complete the following procedure to update a property for all selected products:
 1. Check the property's checkbox.
 2. Select a value from the corresponding drop-down field.
 3. Repeat as needed to update values for other properties.
4. Complete the following procedures as needed to determine how tax types will be affected by this bulk edit:
 - To update tax types for all selected products,
 1. Check the **Check to include tax edits in this edit** checkbox.
 2. Check a tax type's **Include/Exclude** checkbox to apply the tax to all selected products.
 3. Uncheck a tax type's **Include/Exclude** checkbox to remove the tax from all selected products.
 - To complete the bulk edit without changing the tax type for any products, uncheck the **Check to include tax edits in this edit** checkbox.
5. Click the **Submit** button to close the **Bulk Edit Products** window and update the products.
6. Click the tab's **Close** button to close the screen.

Deactivate (/Reactivate) a Product

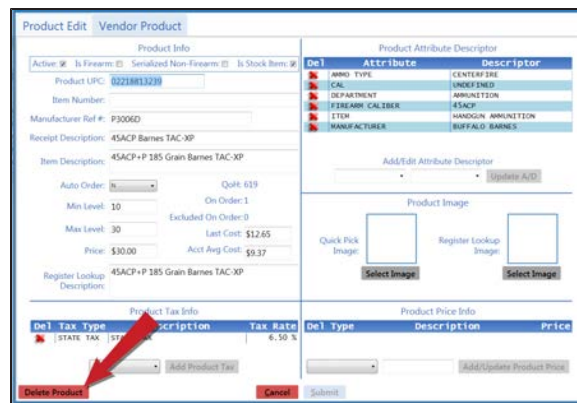
A product that has been discontinued or is no longer carried for any reason may be deactivated (marked as "inactive"). An inactive product remains in the database (and can be reactivated if needed), but it will not appear in product searches or reports.

1. Check a product's checkbox to select it.

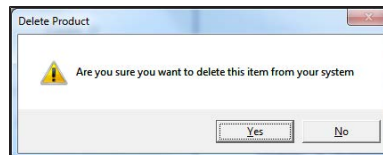


2. Click the **Edit Product** button to display the product's **Product Edit** window.
3. Complete the following procedures as needed to manage the product's active status:

- To deactivate the product:

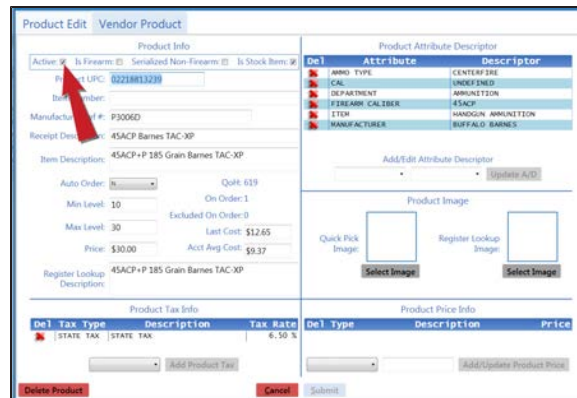


1. Click the **Delete Product** button to display a confirmation screen.



2. Click the **Yes** button to close the confirmation screen and deactivate the item.

- To reactivate the product:



-
1. Check the **Active** checkbox.
 2. Click the **Submit** button to reactivate the product and close the **Product Edit** window.
 4. Click the tab's **Close** button to close the screen.
-

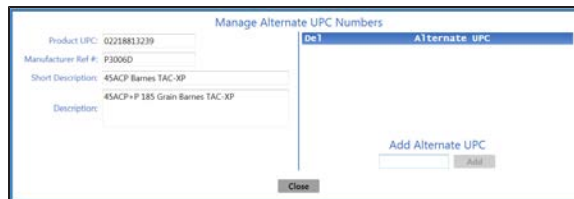
Manage a Product's Alias UPC

An Alias UPC (or Alternate UPC) allows a product to be identified and associated with other products for various purposes. For instance, a product packaged in a box is identical to the same product in a blister pack, but each package has a unique UPC; establish an Alias UPC for the different packages to share.

1. Check a product's checkbox to select it.

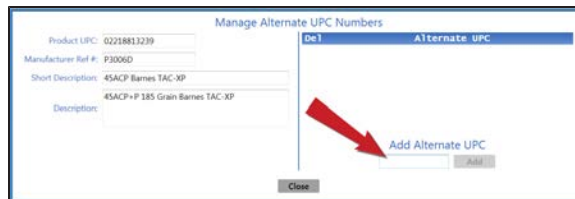


2. Click the **Alias UPCs** button to display the **Manage Alternate UPC Numbers** window.



3. Complete the following procedures as needed to manage the product's alias UPC(s):

- To add an alias UPC to the product:



1. Enter the alias UPC in the **Add Alternative UPC** field.
2. Click the **Add** button to add the alias UPC to the **Alternate UPC** list.
3. Click the **Close** button to close the **Manage Alternate UPC Numbers** window.

- To remove an alias UPC from the product:



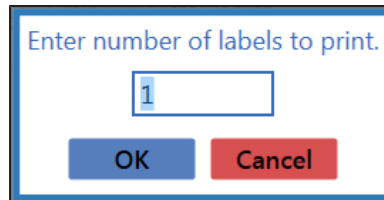
1. Click an alias UPC's **Delete** button to remove it from the **Alternate UPC** list.
 2. Click the **Close** button to close the **Manage Alternate UPC Numbers** window.
4. Click the tab's **Close** button to close the screen.

Print Labels for a Product or Group of Products

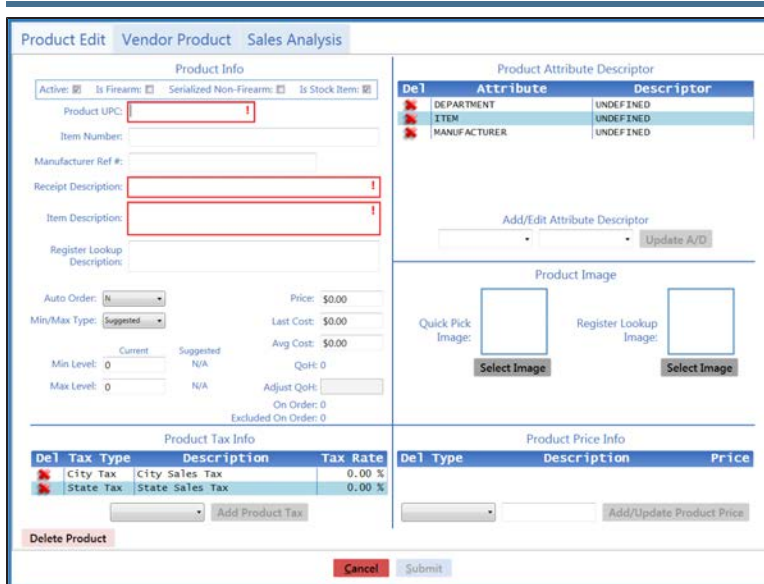
1. Check a product's checkbox to select it. (Repeat as needed to select additional products, or click the **Select All** button to select all products on the screen.)



2. Click the **Print Labels** button to display a number entry screen.



3. Enter the number of labels to print in the field.
4. Click the **OK** button to print the labels.
5. Click the tab's **Close** button to close the screen.



3. Enter/edit Product information in the **Product Info** section:

Note: Required fields and settings are displayed with red borders.

Active	Check the checkbox to mark the item as active and make it available for search and selection in the Register application.
Is Firearm	Check the checkbox to mark the item as a firearm.
Serialized Non-Firearm	Check the checkbox to mark the item as a serial non-firearm and require a serial number to receive or sell it.
Is Stock Item	Check the checkbox to mark the item as a physical item that can be inventoried and sold.
Product UPC	Enter the product's UPC code.
Manufacturer Ref #	Enter the manufacturer's stock number for the item.

Receipt Description	Enter a concise item description (30 characters maximum) to be shown on labels and customer receipts.
Item Description	Enter a lengthy item description (80 characters maximum) to be shown on information screens in the Register application. Note: If an item has been automatically added to the system by a vendor, a description beginning with "AUTO" displays in this field. Feel free to remove the "AUTO" and modify the description as needed.
Register Lookup Description	This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items.
Auto Order	<ul style="list-style-type: none"> • Select A (automatic) to let the system automatically order the item to maintain inventory levels (as defined by the Min Level and Max Level values). • Select N (normal) to retain standard ordering procedures for this item. Note: The Auto Order feature is available only to AcuSport Exchange retailers.
Min/Max Type	Select a min/max type (Suggested , Manual , or Automatic) to modify the product's Min/Max Type designation on the Inventory Level screen.
Current Min Level	Enter/edit a value to modify the product's Current Min value on the Inventory Level screen. If the item's inventory level drops below the minimum, the system can calculate the number of items needed to restock the item to the Max Level value. For example, after a big sale, an item having a Min Level of 3 and a Max Level of 10 has only 2 items remaining in inventory. The system recognizes that inventory is below the minimum level and calculates that 8 (10-2) need to be ordered to bring the item inventory to the maximum level. If Auto Order is activated for the item, the system automatically recognizes these shortages and orders items accordingly. Min/Max calculations are also used to generate suggested ordering quantities when manually creating a vendor-specific purchase order. Refer to Create a Vendor Purchase Order (see page 353) for more information.
Current Max Level	Enter/edit a value to modify the product's Current Max value on the Inventory Level screen.
Suggested Min Level	The field displays the product's Suggested Min value as shown on the Inventory Level screen.
Suggested Max Level	The field displays the product's Suggested Max value as shown on the Inventory Level screen.
Price	Enter/edit the standard price for the item as needed. Note: If no price is entered, the item will ring up for \$0.00 in the Register application.
Last Cost	Edit the last cost for the item as needed.

Avg Cost	Edit the average cost for the item as needed.
QoH	The field displays the product's quantity on hand.
Adjust QoH	Edit the quantity on hand for the item as needed. Note: The Adjust QoH field should not be used with firearms or serialized nonfirearm items.
On Order	The field displays the quantity of the product that is on order.
Excluded On Order	The field displays the quantity of the product that is on order but is not included in QoH calculations.

4. Complete the **Product Tax Info** section to apply tax types to the item:

1. Select the appropriate tax for the item from the drop-down field.

Note: If the required tax type is not available, complete [Manage Tax Types \(see page 321\)](#) to create it.

2. Click the **Add Product Tax** button to display the selected tax in the list.
3. Repeat as needed to add additional taxes.

5. Complete the **Product Attribute Descriptor** section:

1. Select an attribute from the first **Add/Edit Attribute Descriptor** drop-down field.
2. Select a descriptor from the second **Add/Edit Attribute Descriptor** drop-down field.
3. Click the **Update A/D** button to display the selected attribute/descriptor combination in the list.
4. Repeat as needed to add additional attribute/descriptor combinations.

Note: A descriptor must be selected for each mandatory attribute. Refer to [Manage Mandatory Attributes \(see page 91\)](#) for more information.

6. Complete the **Product Image** section:

- To add an image of the product to the **Quick Picks** screen,
 1. Click the **Select Image** button under the **Quick Pick Image** field to display an **Open** window.
 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Quick Pick Image** field.
- To add an image of the product to the **Register Lookup** screen,
 1. Click the **Select Image** button under the **Register Lookup Image** field to display an **Open** window.
 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Register Lookup Image** field.

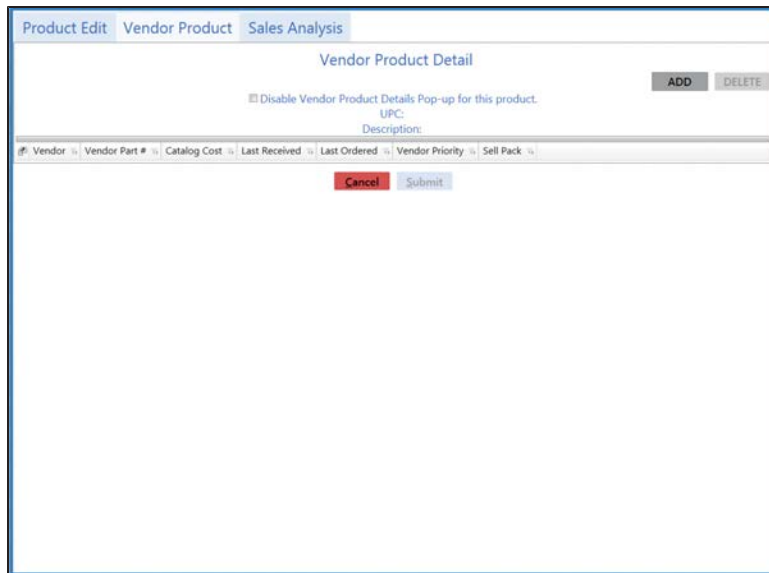
7. Complete the **Product Price Info** section:

1. Select price type from the drop-down (first) field.

Note: If the required price type is not available, refer to [Manage Price Types \(see page 320\)](#) to create it.

2. Enter a price in the second field.
3. Click the **Add/Update Product Price** button to display the price in the list..
4. Repeat as needed to add additional price types.

8. If desired, click the **Vendor Product** tab to display it and complete any of the following procedures:



Add a Vendor Product Detail record for this UPC

1. Click the **Add** button to display the UPC's **Vendor Product Detail** window.

2. Enter/edit the information in the fields:

Vendor	Select a vendor from the drop-down.
Vendor Part #	Enter the vendor's part number for the product.
Catalog Cost	Enter the product's cost from the vendor's catalog.
Vendor Priority	Select the vendor's relative rank (1-5) among possible vendors of this product from the drop-down.
Sell Pack	Enter the minimum number (generally 1) of the product that can be purchased.

3. Click the **Submit** button to create a vendor part number for the product.

Delete a Vendor Product Detail record for this UPC

1. Check a **Vendor Product Detail** record's checkbox to select it.
2. Click the **Delete** button to display a deletion confirmation window.
3. Click the **OK** button to close the window and remove the record from the screen.

Control the behavior of this UPC's Vendor Product Detail window

Check /uncheck the **Disable Vendor Product Details Pop-up for this product** checkbox as desired:

- Check the checkbox to prevent the window from displaying in the future.
- Uncheck the checkbox to allow the window to display in the future.

9. If desired, click the **Sales Analysis** tab to display it and complete any of the following procedures:



Display case UPC or unit UPC data

- If the tab displays a **Case UPC** field, click the field to display the **Sales Analysis** tab for the associated case UPC.
- If the tab displays a **Unit UPC** field, click the field to display the **Sales Analysis** tab for the associated unit UPC.

Adjust lead time

Enter/edit the value in the **Lead Time (Days)** field to display its effect on calculations.

Note: This adjustment is only temporary. To change the value permanently, modify the value of the **Lead Time Days** field on the vendor's **Vendor Information for** screen. Refer to [Set Up and Maintain a Vendor Record](#) (see page 338) for more information.

Modify min/max levels

- Enter/edit the value in the **MIN** field to update the product's **Current Min** value on the **Inventory Level** screen.
- Enter/edit the value in the **MAX** field to update the product's **Current Max** value on the **Inventory Level** screen.

10. Click the **Submit** button to add/update the product on the **Product Maintenance** screen.
11. Click the tab's **Close** button to close the screen.

Import Inventory Item Data

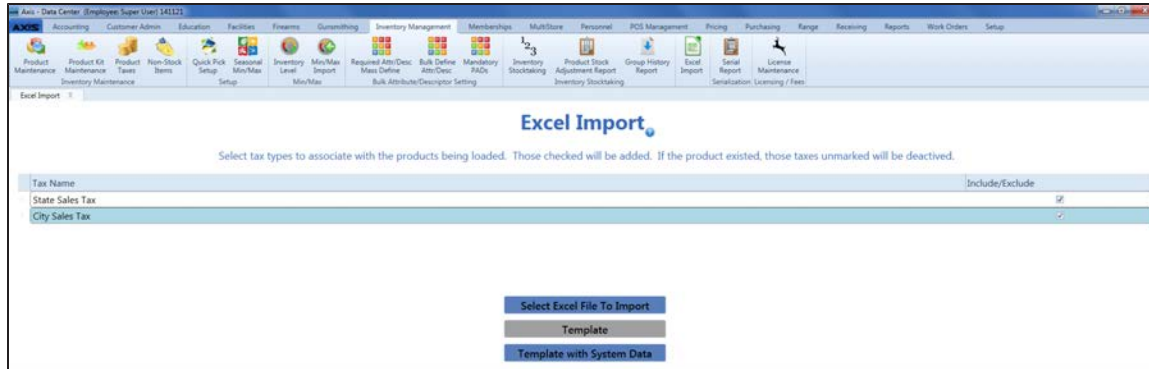
Complete the following procedure to import item data into the inventory by creating, populating, and importing a formatted Excel file.

1. Navigate to the **Excel Import** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Excel Import** from the main menu to display the **Excel Import** screen.



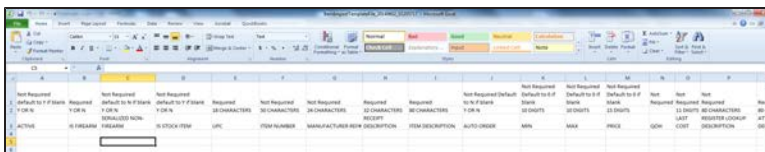
2. Complete the following for each tax type listed in the **Tax Name** column:

Note: If an item being imported already exists in the database, the item's tax settings will be updated to reflect the tax options selected here.

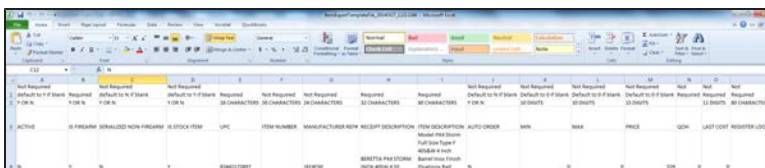
- If the tax type will be applied to the items being imported, check the tax type's **Include/Exclude** checkbox.
- If the tax type will **not** be applied to the items being imported, uncheck the tax type's **Include/Exclude** checkbox.

3. Complete one of the following procedures to export a template format to an Excel file.

- Click the **Template** button to export an unpopulated template.



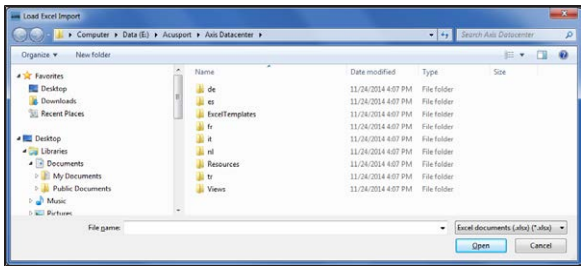
- Click the **Template with System Data** button to export a template populated with all item data from the system.



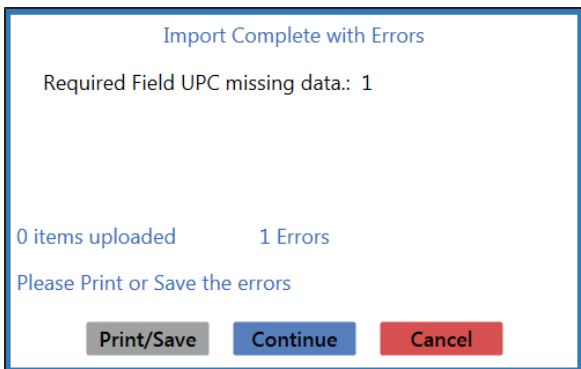
4. Populate the Excel file with item information.

Note: The file must adhere to the validation requirements indicated in row 1 and may not contain duplicate UPCs.

5. Save the Excel file.
6. Click the **Select Excel File to Import** button on the **Excel Import** screen to display the **Load Excel Import** window.



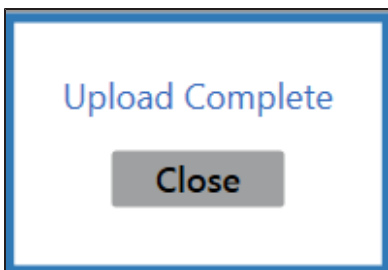
7. Browse to the desired location.
8. Double-click the saved Excel file to select it and start the import process.
9. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
- Click the **Continue** button to continue with the import for the uploaded items.
- Click the **Cancel** button to cancel the import.

10. When the import is complete, the system displays the **Upload Complete** window.



11. Click the **Close** button to close the window.
12. Click the tab's **Close** button to close the screen.

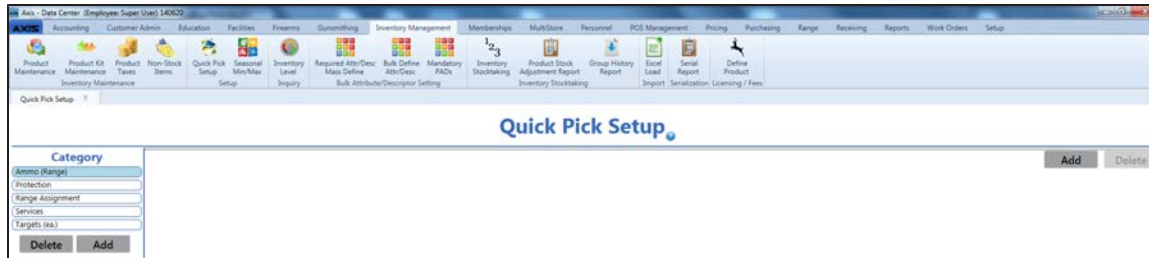
Manage Quick Pick Categories

Note: RTG recommends having no more than 12 Quick Pick categories.

1. Navigate to the **Quick Pick Setup** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

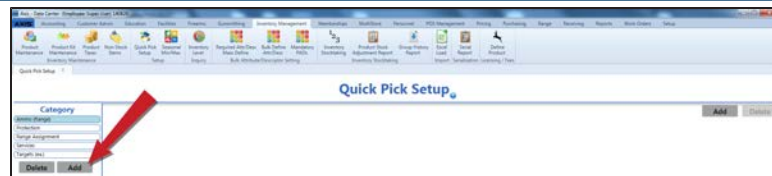


2. Select **Inventory Management > Quick Pick Setup** from the main menu to display the **Quick Pick Setup** screen.

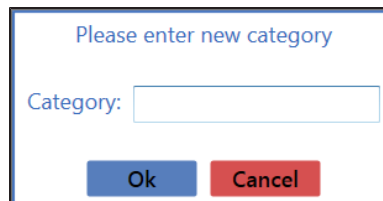


2. Complete the following procedures as needed to manage Quick Pick categories:

Create a Quick Pick Category



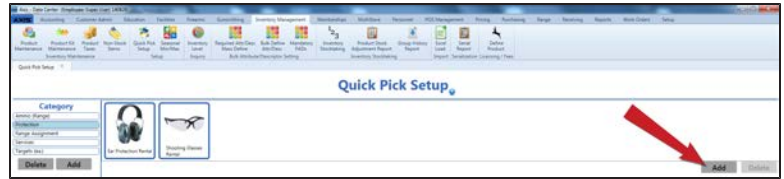
1. Click the **Add** button under the **Category** list to display the new category entry window.

A dialog box titled 'Please enter new category'. It contains a text input field labeled 'Category:'. Below the input field are two buttons: 'Ok' and 'Cancel'.

2. Enter a name for the category in the **Category** field.
3. Click the **OK** button to add the category to the **Category** list.

Add a Product to a Quick Pick Category

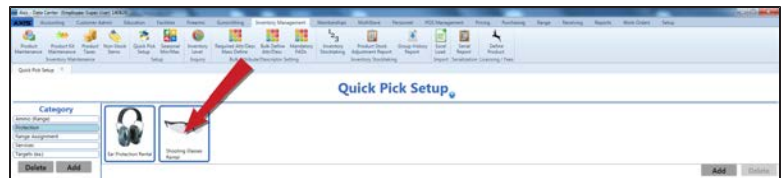
1. Click a category in the **Category** list to display its contents on the screen.



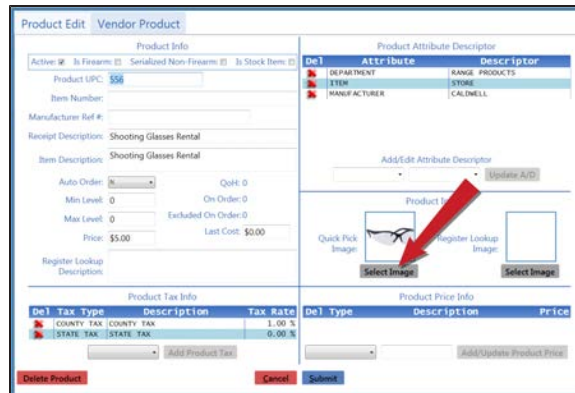
2. Click the **Add** button in the contents section to display the **Product Search** window.
3. [Select One or More Products \(see page 28\)](#) to be added to the category and displayed on the **Quick Pick Setup** screen.

Edit a Product's Quick Pick Image

1. Click a category in the **Category** list to display its contents on the screen.



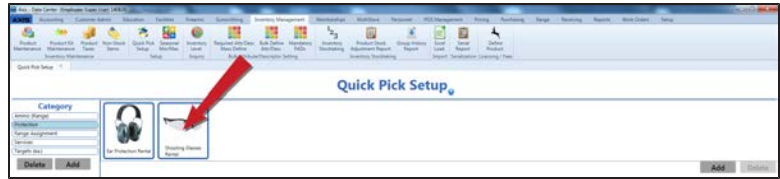
2. Double-click a product in the contents section to display its **Product Edit** window.



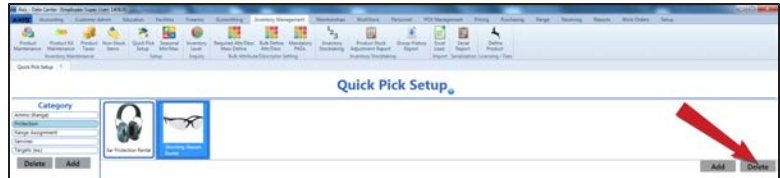
3. Click the **Select Image** button under the **Quick Pick Image** field to display an **Open** window.
4. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Quick Pick Image** field.
5. Click the **Submit** button to add the image to the **Quick Pick Setup** screen.

Remove a Product from a Quick Pick Category

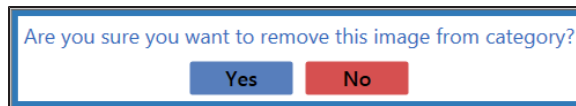
1. Click a category in the **Category** list to display its contents on the screen.



2. Click a product in the contents section to select it.



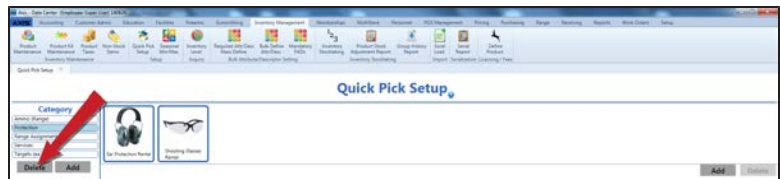
3. Click the **Delete** button in the contents section to display a deletion confirmation window.



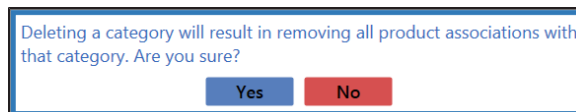
4. Click the **Yes** button to close the window and remove the product from the **Quick Pick Setup** screen.

Delete a Quick Pick Category

1. Click a category in the **Category** list to display its contents on the screen.



2. Click the **Delete** button under the **Category** list to display a deletion confirmation window.



3. Click the **Yes** button to close the window and remove the category from the **Quick Pick Setup** screen.

3. Click the tab's **Close** button to close the screen.

Manage a Product's Min/Max Levels

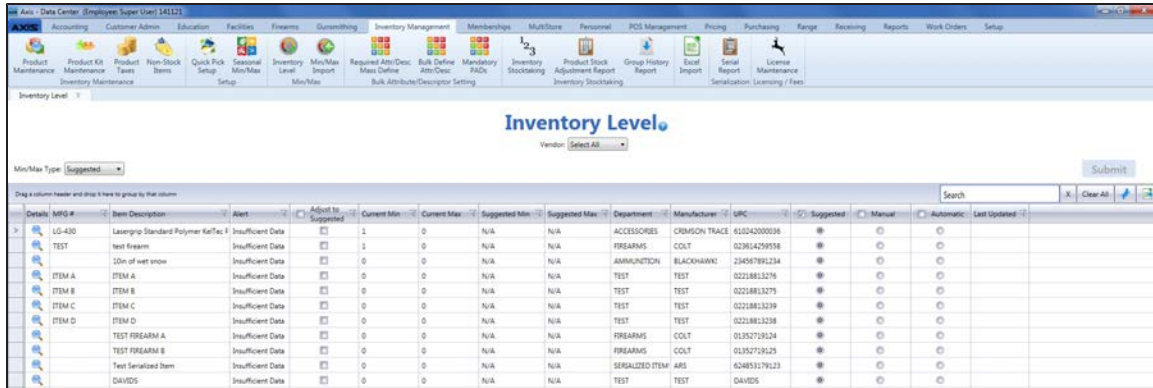
Complete the following procedure to control the method by which an item's min/max levels are set and adjust these levels as needed.

1. Navigate to the **Inventory Level** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Inventory Level** from the main menu to display the **Inventory Level** screen.



2. If desired, select a vendor from the **Vendor** drop-down to display only items associated with that vendor. (Click the **Select All** vendor name to display items from all vendors.)

Note: If an item is linked to a case UPC, the case UPC will display on the screen and the unit UPC will not.

3. Select one of the following options from the **Min/Max Type** drop-down to display items that utilize the corresponding method to set min/max levels.
 - **Suggested:** The system calculates and displays **Suggested Min** and **Suggested Max** values, and the user can update the **Current Min** and **Current Max** values by accepting the calculated values or manually entering new values.
 - **Manual:** This method is useful for items that may not benefit from routine min/max maintenance as they are seasonal, hard-to-get, or otherwise unusual. It functions just like the **Suggested** method.
 - **Automatic:** The system automatically resets **Current Min** and **Current Max** values to match suggested values when they are calculated.
4. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as desired.
5. Complete the following procedures as needed to manage min/max levels:

View an Item's Sales Data

1. Click an item's **Details** button to display its **Sales Analysis** tab in the **Product Edit** window.
2. Complete any of the following procedures as desired:
 - Enter/edit the value in the **Lead Time (Days)** field to display its effect on calculations.

Note: This adjustment is only temporary. To change the value permanently, modify the value of the **Lead Time Days** field on the vendor's **Vendor Information for** screen. Refer to [Set Up and Maintain a Vendor Record \(see page 338\)](#) for more information.

- Enter/edit the values in the **MIN** and **MAX** fields to update the product's **Current Min** and **Current Max** values (respectively) on the **Inventory Level** screen.
- Click the **Product Edit** tab to display it and modify values.

Note: Refer to [Manage Product Information \(see page 149\)](#) for more information.

3. Click the **Submit** button to close the **Product Edit** window.
 4. Complete either of the following to display the updated information on the **Inventory Level** screen
 - Close and reopen the **Inventory Level** screen.
 - Click the **Submit** button to display a change confirmation window and click the window's **OK** button to close it.
-

Adjust an Item's Min/Max Levels to Suggested Values

Note: This feature is not available when **Automatic** is selected in the **Min/Max Type** drop-down.

1. Locate the **Adjust to Suggested** column in the list.
2. Complete the following procedures as needed to select the item(s) that will be adjusted:

Note: When an item is selected, the values in its **Current Min** and **Current Max** cells will temporarily change to match the values in its **Suggested Min** and **Suggested Max** cells (respectively)

- Check an item's **Adjust to Suggested** checkbox to select it.
 - Uncheck an item's **Adjust to Suggested** checkbox to deselect it.
 - Check the **Adjust to Suggested** checkbox in the column header to select all items.
 - Uncheck the **Adjust to Suggested** checkbox in the column header to deselect all items.
3. Click the **Submit** button to display a change confirmation window.
 4. Click the **OK** button to close the window and update the screen.

Change an Item's Min/Max Type

1. Locate the min/max type (**Suggested**, **Manual**, and **Automatic**) columns in the list.
 2. Complete the following procedures as needed to select the item(s) that will be changed:
 - Click an item's min/max type radio button to select that type for the item.
 - Check a min/max type column header's checkbox to select that type for all items.
 - Click the dash (-) in a min/max type column header's checkbox to revert the selected items in that column to their original setting.
 3. Click the **Submit** button to display a change confirmation window.
 4. Click the **OK** button to close the window and update the screen.
-

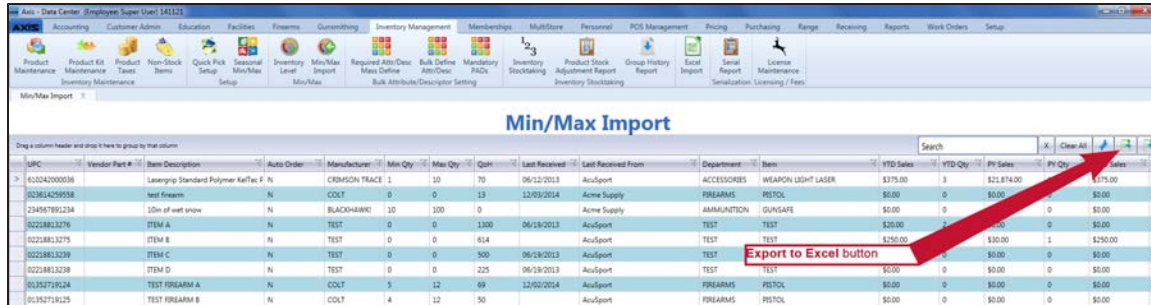
Import Min/Max Levels

Complete the following procedure to import min/max data into the system by creating, populating, and importing a formatted Excel file.

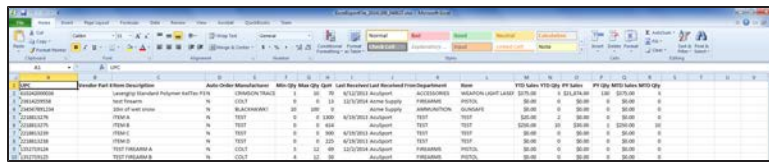
1. Navigate to the **Min/Max Import** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



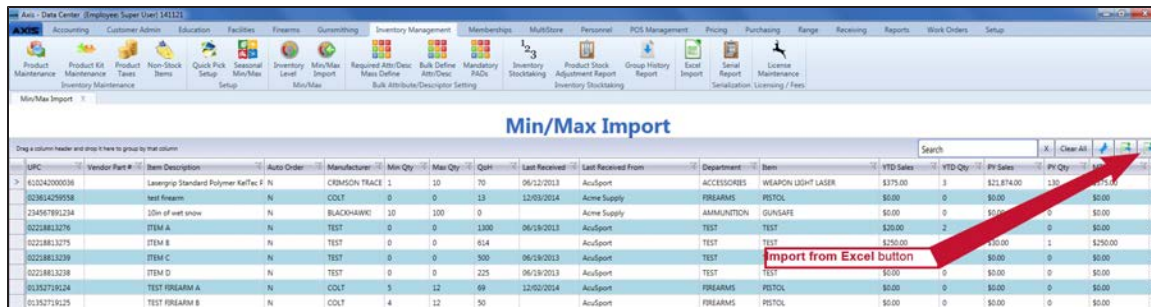
2. Select **Inventory Management > Min/Max Import** from the main menu to display the **Min/Max Import** screen.



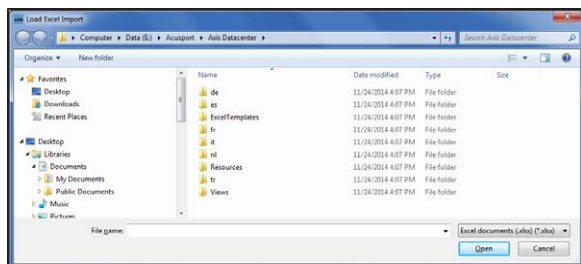
2. Click the **Export to Excel** button to export the template format to an Excel file.



3. Populate the Excel file with min/max information.
4. Save the Excel file.
5. Navigate to the **Min/Max Import** screen.



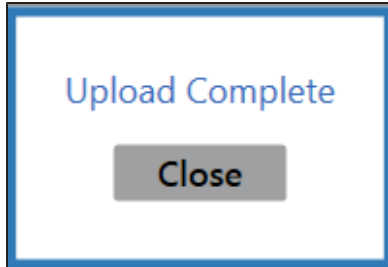
6. Click the **Import from Excel** button to display the **Load Excel Import** window.



7. Browse to the desired location.
8. Double-click the saved Excel file to select it and start the import process.
9. If the system detects any errors, it displays the **Import Complete with Errors** window.

Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
10. When the import is complete, the system displays the **Upload Complete** window.



11. Click the **Close** button to close the window.
12. Click the tab's **Close** button to close the screen.

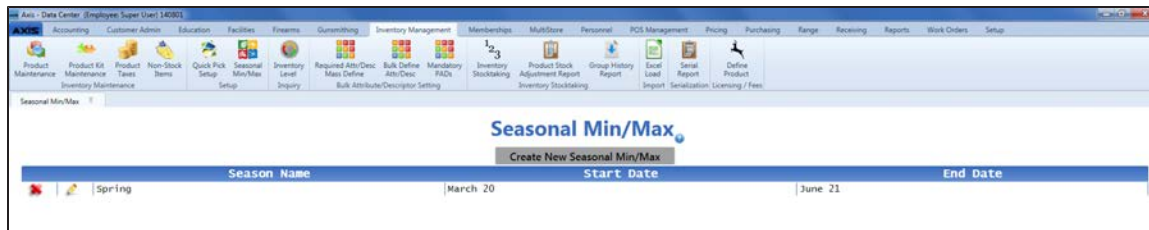
Manage Seasonal Min/Max Values

1. Navigate to the **Seasonal Min/Max** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



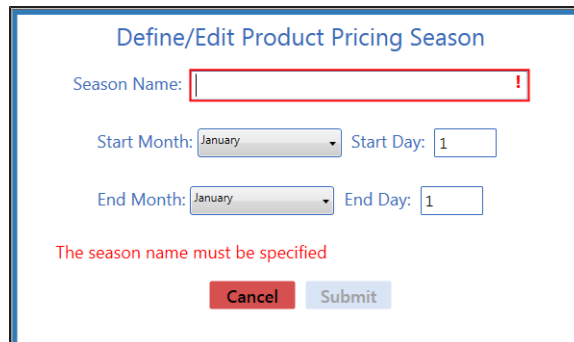
2. Select **Inventory Management > Seasonal Min/Max** from the main menu to display the **Seasonal Min/Max** screen.



2. Complete the following procedures as needed to manage seasonal minimum and maximum values:

Create a New Seasonal Min/Max Period

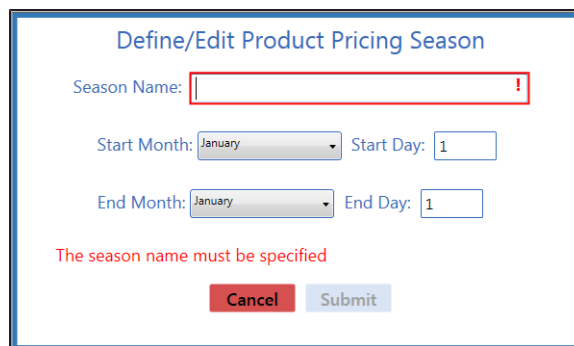
1. Click the **Create New Seasonal Min/Max** button to display the **Define/Edit Product Pricing Season** window.

A screenshot of the 'Define/Edit Product Pricing Season' window. The window title is 'Define/Edit Product Pricing Season'. It contains a form with the following fields: 'Season Name' (text input with a red exclamation mark icon), 'Start Month' (dropdown menu showing 'January'), 'Start Day' (text input showing '1'), 'End Month' (dropdown menu showing 'January'), and 'End Day' (text input showing '1'). Below the form is a red error message: 'The season name must be specified'. At the bottom are 'Cancel' and 'Submit' buttons.

2. Continue with the procedure below.

Edit a Seasonal Min/Max Period

1. Click a season's **Edit** button to display its **Define/Edit Product Pricing Season** window.

A screenshot of the 'Define/Edit Product Pricing Season' window. The window title is 'Define/Edit Product Pricing Season'. It contains a form with the following fields: 'Season Name' (text input with a red exclamation mark icon), 'Start Month' (dropdown menu showing 'January'), 'Start Day' (text input showing '1'), 'End Month' (dropdown menu showing 'January'), and 'End Day' (text input showing '1'). Below the form is a red error message: 'The season name must be specified'. At the bottom are 'Cancel' and 'Submit' buttons.

2. Continue with the procedure below.

Add a Product to a Seasonal Min/Max Period

1. Click a season to display its **Seasonal Min/Max Products** record.
2. Click the **Add Products** button to display the **Product Search** window.

Attribute	Descriptor	UPC	Description	QoH	Price
<input type="checkbox"/>		023614072010	Browning 1911-22 COMP AUTO Black	0	\$549.00
<input type="checkbox"/>		076683239143	Speer 327 Federal 115 Grain Gold Dot	16	\$24.99
<input type="checkbox"/>		1123456	ZOMBIE WITH KID TARGET	106	\$1.99
<input type="checkbox"/>		112345678	ZOMBIE WITH WOMAN	62	\$1.99
<input type="checkbox"/>		123	ZOMBIE CLOWN	69	\$1.99
<input type="checkbox"/>		123345	Blue Widget	-7	\$9.99
<input type="checkbox"/>		123456789123	TEST ITEM	20	\$35.99
<input type="checkbox"/>		29465027131	Federal Field & Range 12 Ga. 2 3/4\"	-7	\$9.99
<input type="checkbox"/>		39873336	BAD GUY TARGET	37	\$1.99
<input type="checkbox"/>		600000000000	PISTOL LANE	0	\$20.00
<input type="checkbox"/>		600000000001	PISTOL SECOND SHOOTER	0	\$20.00
<input type="checkbox"/>		600000000002	LONG GUN LANE	0	\$20.00
<input type="checkbox"/>		600000000003	LONG GUN SECOND SHOOTER	0	\$20.00

3. Complete any of these procedures to limit the number of products shown:
 - Enter all or part of a product's description in the **Description** field.
 - Enter all or part of a product's UPC code number in the **UPC** field.
 - Click an **Attribute** button and one of its associated **Descriptor** buttons. (Repeat as needed to further restrict products with additional attributes and descriptors.)
 - Click the **Clear** button to remove all Attribute/Descriptor filters.
4. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Unselect All** button to deselect all products.
5. Enter a minimum quantity in the **Min** field.
6. Enter a maximum quantity in the **Max** field.
7. Click the **Adjust** button to add the selected product(s) to the **Seasonal Min/Max Products** window.
8. Double-click the **Seasonal Min/Max Products** record to close it.

Edit a Product's Seasonal Min/Max Values

1. Click a season to display its **Seasonal Min/Max Products** window.
2. Click a product's **Edit** button to display its **Edit Min/Max** window.
3. Edit the minimum quantity in the **Min** field.
4. Edit the maximum quantity in the **Max** field.
5. Click the **Submit** button to display updated quantity levels in the **Seasonal Min/Max Products** window.
6. Double-click the **Seasonal Min/Max Products** window to close it.
7. Click the tab's **Close** button to close the screen.

Remove a Product from a Seasonal Min/Max Period

1. Click a season to display its **Seasonal Min/Max Products** window.
2. Click a product's **Delete** button to display a deletion confirmation window.
3. Click the **Yes** button to close the window and remove the product from the **Seasonal Min/Max Products** window.
4. Double-click the **Seasonal Min/Max Products** window to close it.
5. Click the tab's **Close** button to close the screen.

Delete a Seasonal Min/Max Period

1. Click a season's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to close the window and remove the season from the **Seasonal Min/Max** screen.
3. Click the tab's **Close** button to close the screen.

3. [Enter/edit Seasonal Min/Max information in the window.](#)

Note: Required fields and settings are displayed with red borders.

Season Name	Enter a name for the seasonal period.
Start Month	Select the month in which the season starts.
Start Day	Enter the date (e.g., 29) on which the season starts.
End Month	Select the month in which the season ends.
End Day	Enter the date (e.g., 29) on which the season ends.

4. Click the **Submit** button to add/update the season on the **Seasonal Min/Max** screen and display its **Seasonal Min/Max Products** window.
5. Complete procedures to [Add a product](#), [Edit a product's Min/Max values](#), or [Remove a product](#) as needed.
6. Click the tab's **Close** button to close the screen.

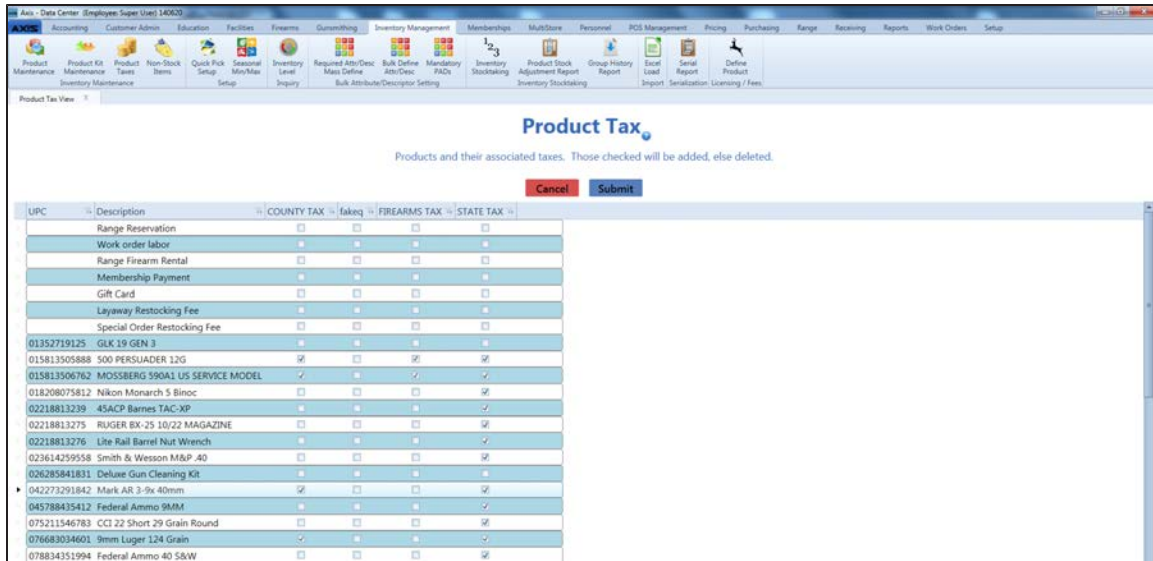
Update Tax Types for a Product

1. Navigate to the **Product Tax** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Product Taxes** from the main menu to display the **Product Tax** screen.



2. Locate the product requiring an update and complete the following procedures as needed:
 - To apply a tax type to the product, check the product checkbox associated with the tax type.
 - To remove a tax type from a product, uncheck the product checkbox associated with the tax type.
3. Repeat steps as needed to update taxes for additional products.
4. Click the **Submit** button to complete the tax type update and close the screen.

Manage Product Kits

1. Navigate to the **Product Kit Maintenance** screen.

1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Product Kit Maintenance** from the main menu to display the **Product Kit Maintenance** screen.

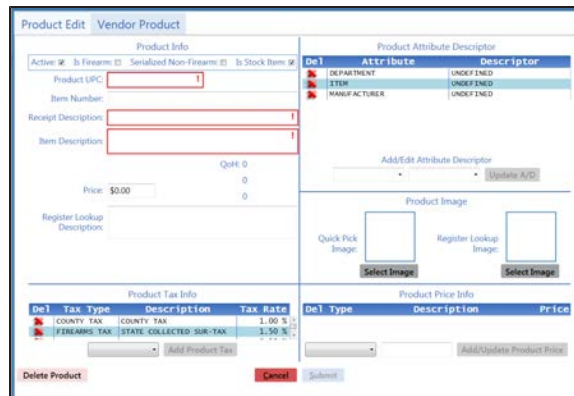


2. Complete the following procedures as needed to manage product kits:

Create a Product Kit



1. Click the **Add Product Kit** button to display the **Product Edit** window.

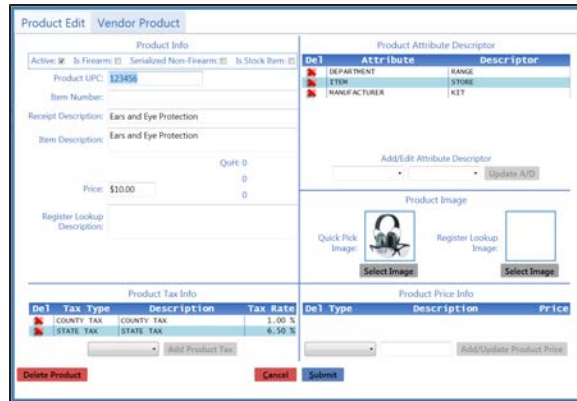
A screenshot of the Product Edit window. It is divided into several sections: Product Info (with fields for Active, Is Firearm, Serialized Non-Firearm, Is Stock Item, Product UPC, Item Number, Receipt Description, Item Description, Price, and Register Lookup Description); Product Attribute Descriptor (with a table for Attribute and Descriptor); Product Image (with Quick Pick Image and Register Lookup Image); Product Tax Info (with a table for Del, Tax Type, Description, Tax Rate); and Product Price Info (with a table for Del, Type, Description, Price). There are buttons for 'Delete Product', 'Cancel', 'Submit', and 'Add/Update Product Price'.

2. Continue with the procedure below.

Edit a Product Kit



1. Click a product kit's **Edit** button to display its **Product Edit** window.



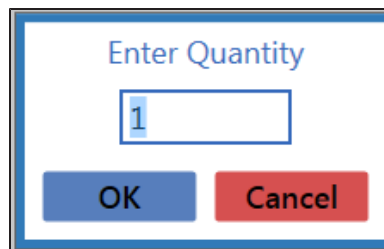
2. Continue with the procedure below.

Add a Product to a Kit

1. Click a product kit to display its **Product Kit Items** record.



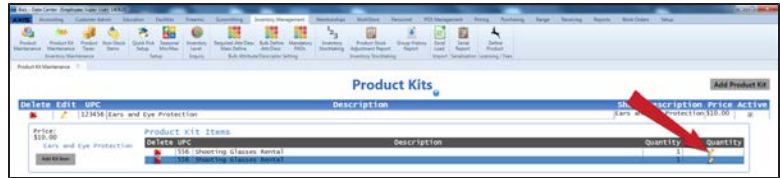
2. Click the **Add Kit Item** button to display the **Product Search** window.
3. [Select a Single Product \(see page 27\)](#) to display the **Enter Quantity** window.



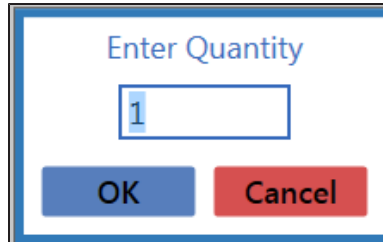
4. Enter the quantity of this product to include in the kit in the **Enter Quantity** field.
5. Click the **OK** button to close the window.

Edit a Product Quantity in a Kit

1. Click a product kit to display its **Product Kit Items** record.



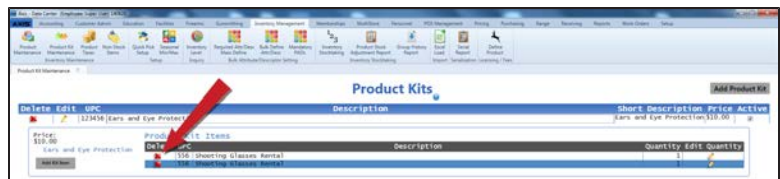
2. Click a product's **Edit Quantity** button to display its **Enter Quantity** window.



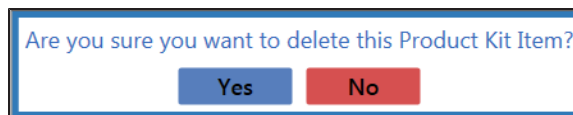
3. Edit the quantity of this product to include in the kit in the **Enter Quantity** field.
4. Click the **OK** button to close the window.

Delete a Product from a Kit

1. Click a product kit to display its **Product Kit Items** record.



2. Click a product's **Delete** button to display a deletion confirmation window.



3. Click the **Yes** button to close the window and remove the product from the **Product Kit Items** window.

Delete a Product Kit



1. Click a product kit's **Delete** button to remove it from the **Product Kits** screen.
2. Click the tab's **Close** button to close the screen.

3. Enter/edit Product information in the **Product Info** section:

Note: Required fields and settings are displayed with red borders.

Active	Check the checkbox to mark the kit as active and make it available for search and selection in the Register application.
Is Firearm	Check the checkbox to mark the kit as a firearm.

Serialized Non-Firearm	Check the checkbox to mark the kit as a serial non-firearm and require a serial number to receive or sell it.
Is Stock Item	Check the checkbox to mark the kit as a physical item that can be inventoried and sold.
Product UPC	Enter the kit's UPC code.
Item Number	Enter a stock number for the item.
Receipt Description	Enter a concise kit description (30 characters maximum) to be shown on labels and customer receipts.
Item Description	Enter a lengthy kit description (80 characters maximum) to be shown on information screens in the Register application. Note: If an item has been automatically added to the system by a vendor, a description beginning with "AUTO" displays in this field. Feel free to remove the "AUTO" and modify the description as needed.
Price	Enter the standard price for the kit. Note: If no price is entered, the kit will ring up for \$0.00 in the Register application.
Register Lookup Description	This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items.

4. Complete the **Product Tax Info** section to apply tax types to the item:

1. Select the appropriate tax for the item from the drop-down field.

Note: If the required tax type is not available, complete [Manage Tax Types \(see page 321\)](#) to create it.

2. Click the **Add Product Tax** button to display the selected tax in the list.
3. Repeat as needed to add additional taxes.

5. Complete the **Product Attribute Descriptor** section:

1. Select an attribute from the first **Add/Edit Attribute Descriptor** drop-down field.
2. Select a descriptor from the second **Add/Edit Attribute Descriptor** drop-down field.
3. Click the **Update A/D** button to display the selected attribute/descriptor combination in the list.
4. Repeat as needed to add additional attribute/descriptor combinations.

Note: A descriptor must be selected for each mandatory attribute. Refer to [Manage Mandatory Attributes \(see page 91\)](#) for more information.

6. Complete the **Product Image** section:

- To add an image of the product to the **Quick Picks** screen,
 1. Click the **Select Image** button under the **Quick Pick Image** field to display an **Open** window.
 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Quick Pick Image** field.
- To add an image of the product to the **Register Lookup** screen,
 1. Click the **Select Image** button under the **Register Lookup Image** field to display an **Open** window.
 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Register Lookup Image** field.

7. Complete the **Product Price Info** section:

1. Select price type from the drop-down (first) field.

Note: If the required price type is not available, complete [Manage Price Types \(see page 320\)](#) to create it.

2. Enter a price in the second field.
 3. Click the **Add/Update Product Price** button to display the price in the list..
 4. Repeat as needed to add additional price types.
8. Click the **Submit** button to add the kit to the **Product Maintenance** screen.
 9. Click the tab's **Close** button to close the screen.

View and Edit Non-Stock Items

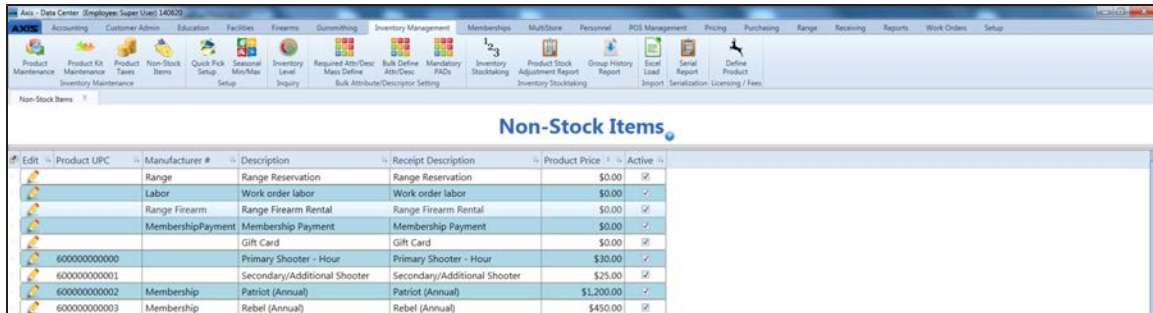
1. Navigate to the **Non-Stock Items** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



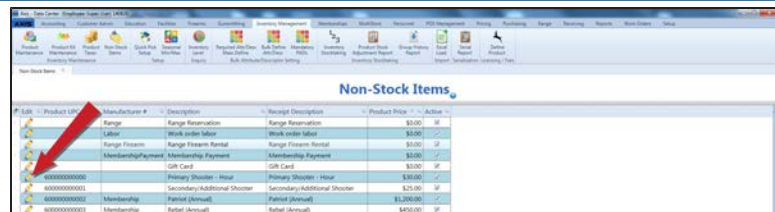
2. Select **Inventory Management > Non-Stock Items** from the main menu to display the **Non-Stock Items** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedure as needed to edit a non-stock item:

Edit a Non-Stock Item



1. Click an item's **Edit** button to display its **Product Edit** window.
2. Enter/edit information in this window as appropriate.
Note: Refer to [Manage Product Information \(see page 149\)](#) for information on completing the sections of this window.
3. Click the **Submit** button to update the item on the **Non-Stock Items** screen.

Note: If the item was changed to a stock item or set to inactive status, it will not display on the **Non-Stock Items** screen.

3. Click the tab's **Close** button to close the screen.

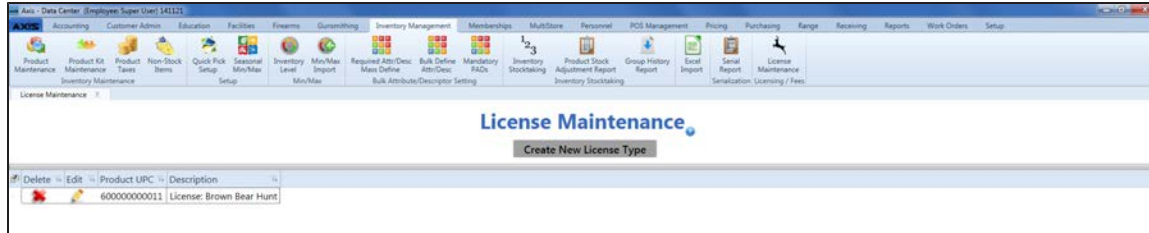
Manage License Types

Complete the following procedure to set up and maintain licenses in the product database.

1. Navigate to the **License Maintenance** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



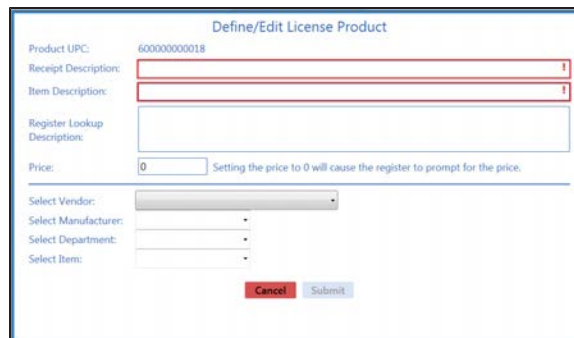
2. Select **Inventory Management > License Maintenance** from the main menu to display the **License Maintenance** screen.



2. Complete the following procedures as needed to manage license types:

Create a New License Type

1. Click the **Create New License Type** button to display the **Define/Edit License Product** window.

A screenshot of the 'Define/Edit License Product' window. The title bar reads 'Define/Edit License Product'. The form contains the following fields:

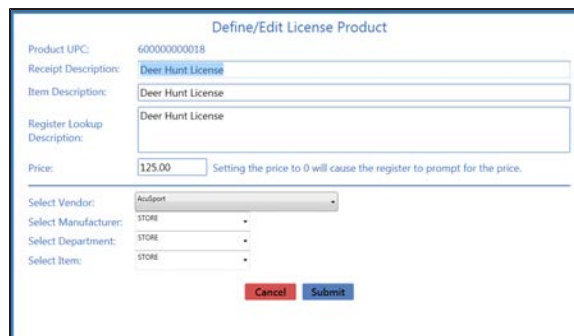
- Product UPC: 60000000018
- Receipt Description: (empty)
- Item Description: (empty)
- Register Lookup Description: (empty)
- Price: 0. Setting the price to 0 will cause the register to prompt for the price.
- Select Vendor: (dropdown menu)
- Select Manufacturer: (dropdown menu)
- Select Department: (dropdown menu)
- Select Item: (dropdown menu)

At the bottom, there are 'Cancel' and 'Submit' buttons.

2. Continue with the procedure below.

Edit a License Type

1. Click a license's **Edit** button to display its **Define/Edit License Product** window.

A screenshot of the 'Define/Edit License Product' window. The title bar reads 'Define/Edit License Product'. The form contains the following fields:

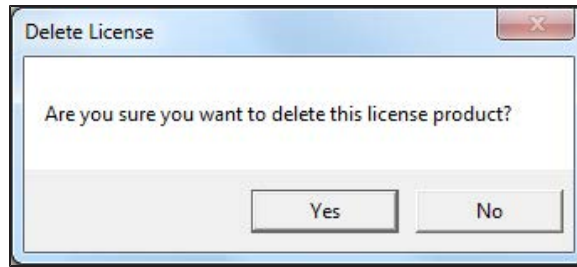
- Product UPC: 60000000018
- Receipt Description: Deer Hunt License
- Item Description: Deer Hunt License
- Register Lookup Description: Deer Hunt License
- Price: 125.00. Setting the price to 0 will cause the register to prompt for the price.
- Select Vendor: Acupport
- Select Manufacturer: STORE
- Select Department: STORE
- Select Item: STORE

At the bottom, there are 'Cancel' and 'Submit' buttons.

2. Continue with the procedure below.

Delete a License Type

1. Click a license's **Delete** button to display a deletion confirmation window.



2. Click the **Yes** button to close the window and remove the license from the **License Maintenance** screen.
3. Click the tab's **Close** button to close the screen.

3. Enter/edit License Product information in the window.

Note: Required fields and settings are displayed with red borders.

Receipt Description	Enter a concise item description (30 characters maximum) to be shown on labels and customer receipts.
Item Description	Enter a lengthy item description (80 characters maximum) to be shown on information screens in the Register application.
Register Lookup Description	This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items.
Price	Enter the standard price for the item. Note: If no price is entered, the item will ring up for \$0.00 in the Register application.
Select Vendor	Select the license's vendor from the drop-down.
Select Manufacturer	Select the license's manufacturer from the drop-down.
Select Department	Select the license's department attribute descriptor from the drop-down.
Select Item	Select the license's item attribute descriptor from the drop-down.

4. Click the **Submit** button to add/update the license on the **License Maintenance** screen.
5. Click the tab's **Close** button to close the screen.

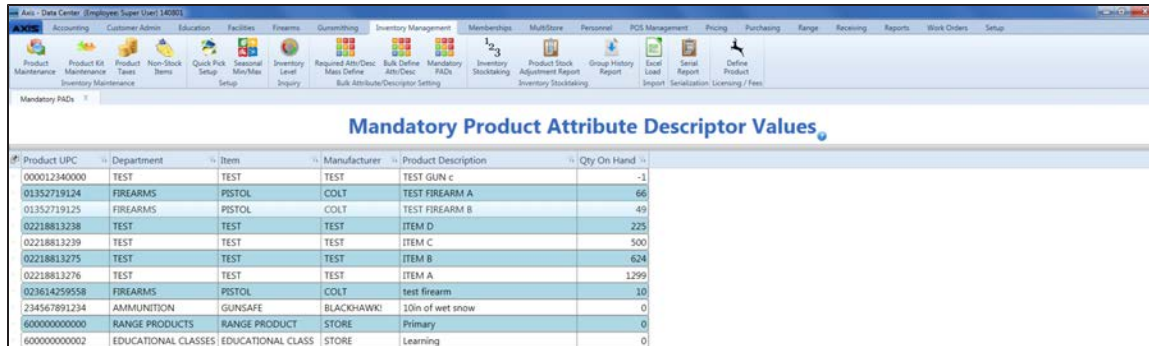
View Descriptor Values for Mandatory Attributes

1. Navigate to the **Mandatory Product Attribute Descriptor Values** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Mandatory PADS** from the main menu to display the **Mandatory Product Attribute Descriptor Values** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

A screenshot of the 'Mandatory Product Attribute Descriptor Values' screen. The screen displays a table with the following columns: Product UPC, Department, Item, Manufacturer, Product Description, and Qty On Hand. The table contains several rows of data, including test items and real products like 'test firearm' and '10in of wet snow'.

Product UPC	Department	Item	Manufacturer	Product Description	Qty On Hand
000012340000	TEST	TEST	TEST	TEST GUN c	-1
01352719124	FIREARMS	PISTOL	COLT	TEST FIREARM A	66
01352719125	FIREARMS	PISTOL	COLT	TEST FIREARM B	49
02218813238	TEST	TEST	TEST	ITEM D	225
02218813239	TEST	TEST	TEST	ITEM C	500
02218813275	TEST	TEST	TEST	ITEM B	624
02218813276	TEST	TEST	TEST	ITEM A	1299
023614259558	FIREARMS	PISTOL	COLT	test firearm	10
234567891234	AMMUNITION	GUNSAFE	BLACKHAWK!	10in of wet snow	0
600000000000	RANGE PRODUCTS	RANGE PRODUCT	STORE	Primary	0
600000000002	EDUCATIONAL CLASSES	EDUCATIONAL CLASS	STORE	Learning	0

2. If a product has a missing or incorrect attribute/descriptor combination, click the product to display its **Product Edit** window.

Note: Refer to [Manage Product Information \(see page 149\)](#) for information about assigning attribute/descriptor combinations.

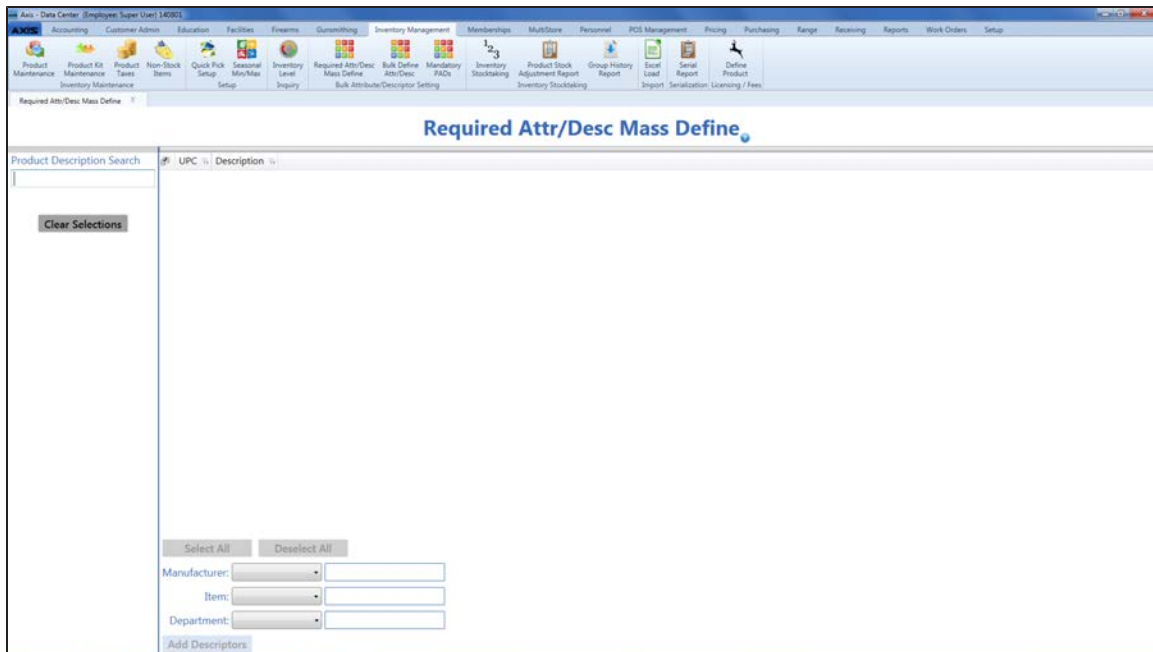
3. Click the tab's **Close** button to close the screen.

Assign a Mandatory Attribute to a Group of Products

1. Navigate to the **Required Attr/Desc Mass Define** screen.
 1. [Log In to the Data Center Application](#) (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Required Attr/Desc Mass Define** from the main menu to display the **Required Attr/Desc Mass Define** screen.



2. Use onscreen controls as needed to determine what products are displayed on the screen:
 - Scroll to view the entire list of products.
 - Enter all or part of a product's description in the **Product Description Search** field to display only matching products.
 - Clear the text from the **Product Description Search** field to display all products as originally shown.
3. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Deselect All** button to deselect all products.
 - Click the **Clear Selections** button to deselect all products.
4. Complete the following procedures as needed to update mandatory attributes for selected product(s):
 - Select a descriptor from the **Manufacturer** drop-down field or enter the name of a new descriptor in the corresponding text entry field.
 - Select a descriptor from the **Item** drop-down field or enter the name of a new descriptor in the corresponding text entry field.
 - Select a descriptor from the **Department** drop-down field or enter the name of a new descriptor in the corresponding text entry field.

Note: Be sure to spell and capitalize descriptor names correctly as they cannot be edited after entry.

5. Click the **Add Descriptors** button to update all selected products.
6. Click the tab's **Close** button to close the screen.

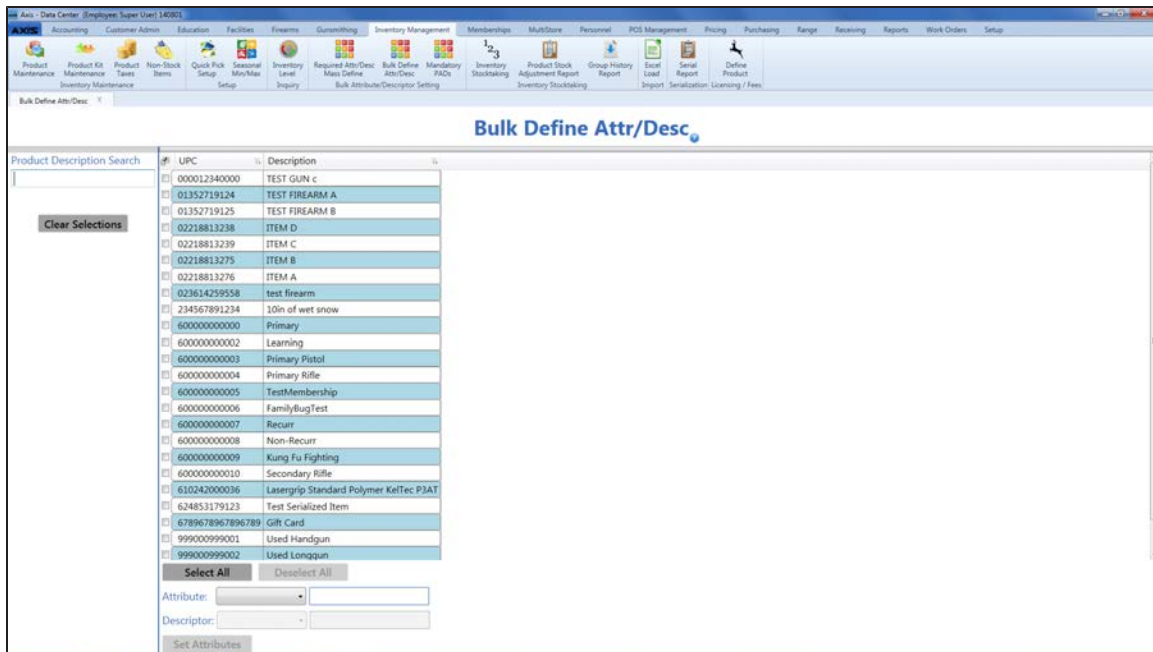
Assign an Attribute to a Group of Products

1. Navigate to the **Bulk Define Attr/Desc** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Bulk Define Attr/Desc** from the main menu to display the **Bulk Define Attr/Desc** screen.



2. Use onscreen controls as needed to determine what products are displayed on the screen:
 - Scroll to view the entire list of products.
 - Enter all or part of a product's description in the **Product Description Search** field to display only matching products.
 - Clear the text from the **Product Description Search** field to display all products as originally shown.
3. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Deselect All** button to deselect all products.
 - Click the **Clear Selections** button to deselect all products.
4. Complete either of these procedures to select the attribute to be set for all selected products:
 - Select the attribute from the **Attribute** drop-down field.
 - Enter the name of a new attribute in the corresponding text entry field.

Note: Be sure to spell and capitalize the attribute name correctly as it cannot be edited after entry.
5. Complete either of these procedures to select the descriptor to be set for all selected products:

- Select the descriptor from the **Descriptor** drop-down field.
- Enter the name of a new descriptor in the corresponding text entry field.

Note: Be sure to spell and capitalize the descriptor name correctly as it cannot be edited after entry.

6. Click the **Set Attributes** button to update all selected products.
7. Click the tab's **Close** button to close the screen.

View the Serial Number Report

1. Navigate to the **Serial Number Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Serial Report** from the main menu to display the **Serial Number Report** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

A screenshot of the Serial Number Report screen. The screen title is 'Serial Number Report'. Below the title is a table with the following columns: #, Store, Acquired Date, UPC, Description, Manufacturer, Department, Serial Number, Vendor, Customer name, Date Sold, and Date Returned. The table contains 16 rows of data, with the first 16 rows having a 'Date Returned' value of 2014/03/10. The data is as follows:

#	Store	Acquired Date	UPC	Description	Manufacturer	Department	Serial Number	Vendor	Customer name	Date Sold	Date Returned
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	1	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	2	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	3	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	4	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	5	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	6	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	7	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	8	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	9	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	10	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	11	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	12	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	13	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	14	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	15	Acusport			2014/03/10
1	1	2013/06/19	624853179123	Test Serialized Item	ARS	SERIALIZED ITEMS	16	Acusport			2014/03/10
1	1	2014/03/10	DAVIDS	DAVIDS	TEST	TEST	D1	Acusport			2014/03/10
1	1	2014/03/10	DAVIDS	DAVIDS	TEST	TEST	D2	Acusport			2014/03/10
1	1	2014/03/10	DAVIDS	DAVIDS	TEST	TEST	D3	Acusport			2014/03/10
1	1	2014/03/10	DAVIDS	DAVIDS	TEST	TEST	D4	Acusport			2014/03/10
1	1	2014/03/10	DAVIDS	DAVIDS	TEST	TEST	D5	Acusport			2014/03/10

2. Click the tab's **Close** button to close the screen.

Perform a Physical Inventory Count for Non-Firearm Items

Complete the following procedure to take a physical inventory count for select non-firearm inventory items.

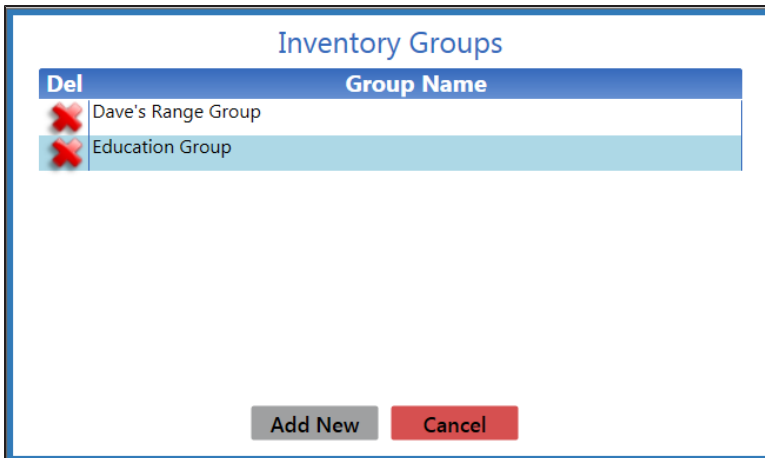
Note: A physical inventory count is essential for verifying Quantity on Hand values against actual, physical inventory in the store/warehouse, identifying and accounting for discrepancies (due to theft, entry errors, etc.), and ensuring resulting counts and values are accurate. A physical inventory count is not intended to be used for initial entry of inventory which is new to the system. Inventory values cannot be accurate without the cost history captured through the Receiving process.

Note: Because this procedure does not capture or verify serial numbers, it is intended only for counting non-serialized/non-firearm items.

1. Navigate to the **Product Inventory Stocktaking** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



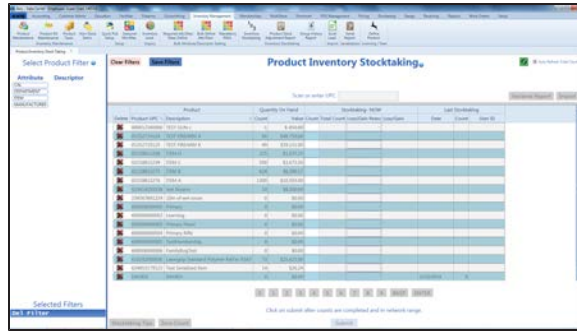
2. Select **Inventory Management > Inventory Stocktaking** from the main menu to display the **Inventory Groups** window in front of the **Product Maintenance** screen.



3. Complete one of the following procedures as appropriate to select the desired inventory group:

Create a New Inventory Group

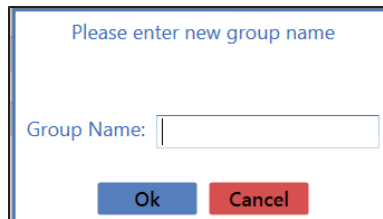
1. Click the **Add New** button to close the **Inventory Groups** window and display the **Product Inventory Stocktaking** screen.



2. Complete the following procedure as needed to filter the items displayed on the screen with attribute/descriptor combinations:
 1. Click an **Attribute** button and one of its associated **Descriptor** buttons to filter the items shown.
 2. If needed, select another attribute/descriptor combination to further filter the list.

Note: To remove an unwanted filter (attribute/descriptor combination), click its **Delete** (red X) button in the **Selected Filters** list.
To remove all filters, click the **Clear Filters** button so a new search may be done.

3. Click the **Save Filters** button to display the **Please enter new group name** window.

The dialog box has a title "Please enter new group name". Below the title is a text input field labeled "Group Name:". At the bottom, there are two buttons: "Ok" (blue) and "Cancel" (red).

4. Enter a unique name for the inventory group in the **Group Name** field.

Note: Group names may not be reused.

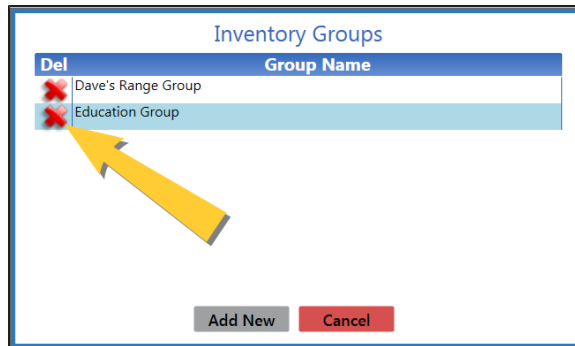
5. Click the **OK** button to create the group and close the **Inventory Groups** window. The **Product Inventory Stocktaking** screen will display the selected group name in the **Current Group Name:** heading.
6. Continue with the procedure below.

Select an Existing Inventory Group

1. Double-click an inventory group name to select the group and close the **Inventory Groups** window.
The **Product Inventory Stocktaking** screen will display the selected group name in the **Current Group Name:** heading.
2. Continue with the procedure below.

Delete an Inventory Group

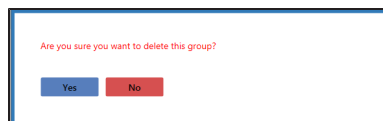
Note: An inventory stocktaking group can be deleted from the **Inventory Groups** window if no other users are actively logged into the group.



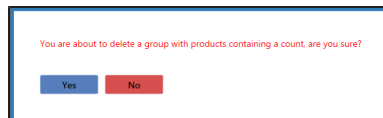
1. Click a group's **Delete** button to display a deletion confirmation window.

Note: If another user is logged into the group, the system will display a message indicating the group cannot be deleted and why.

- If no counts have been entered for the group's items, the system displays this message:



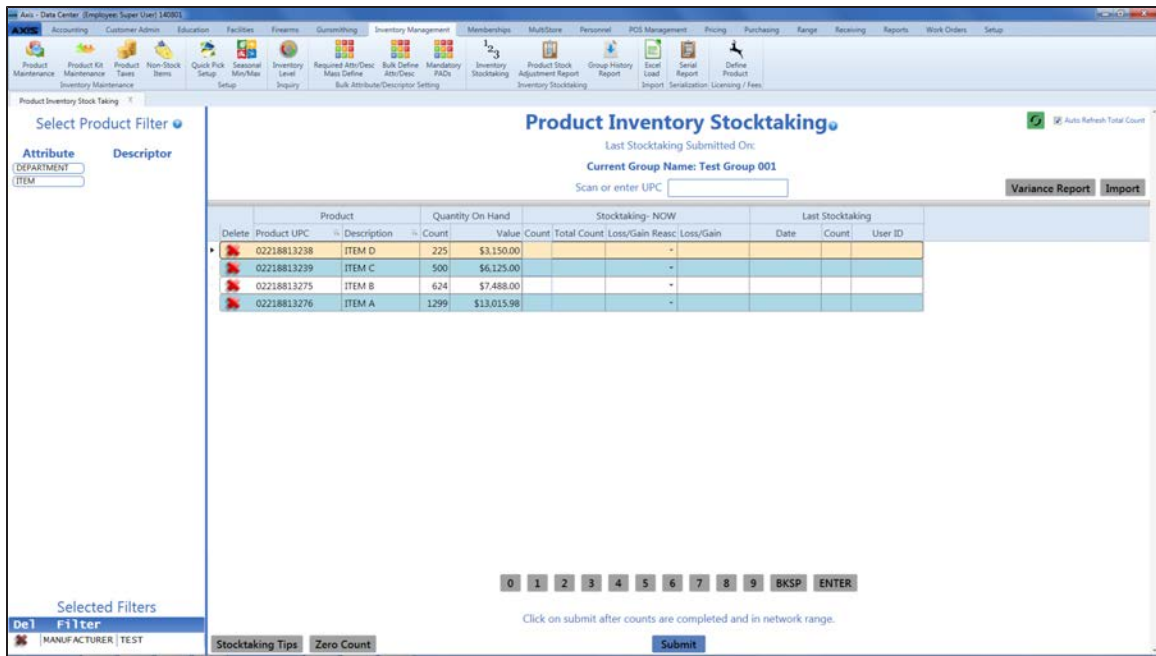
- If any item counts have been entered for the group, the system displays this message:



2. Click the **Yes** button to close the window and remove the group from the list.

Note: When a group is deleted, its items are once again available for inclusion in another group.

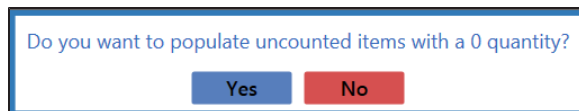
3. Click the tab's **Close** button to close the screen.
-



- For each item on the list, use either of the following methods to record an accurate count value in the item's **Stocktaking-NOW Count** field:

Note: These count procedures may be performed with a tablet, laptop with scanner, handheld PDA, or an electronic device outside of the range of the server to be submitted when the device is back in range with the server.

- Count the number of items in a location and manually update the value in the field accordingly.
 - Complete one of these procedures to identify a single item by its UPC and increase the value in the field by one (1):
 - Scan an item's UPC code in the **Enter or scan UPC number** field and press the **Enter** key.
 - Enter the item's UPC code in the **Enter or scan UPC number** field and press the **Enter** key.
 - Click in the **Enter or scan UPC number** field, click the number keys on the bottom of the screen to enter the UPC code, and click the **Enter** button.
- If needed, complete the following procedure to populate all empty **Stocktaking-NOW Count** and **Stocktaking-NOW Total Count** fields with a value of zero (0):
 - Click the **Zero Count** button to display a confirmation window.



- Click the **Yes** button to populate every empty cell in the **Stocktaking-NOW Count** and **Stocktaking-NOW Total Count** columns with a zero (0) quantity.
- Review the **Stocktaking-NOW Loss/Gain** field for each item on the list:
 - If an item's **Loss/Gain** field displays a positive or negative number, select the appropriate loss/gain reason from the item's **Stocktaking-NOW Loss/Gain Reason** drop-down field.
 - If an item's **Loss/Gain** field displays a zero (0), the inventory count matches the previous QOH. (No loss-gain reason is required.)
 - Complete the following procedure as needed to generate and view the **Variance Report**:

Note: The **Variance Report** displays a record of differences between the Quantity on Hand (QOH) shown in the books and the quantities captured during a stocktaking procedure.

View the Variance Report

1. Click the **Variance Report** button to display the **Variance Report** in the **Report Viewer** window.



Product UPC	Description	QOH	Total Count	Loss Gain	Last Cost	Cost Difference	Loss/Gain Reason	New Count
92218813297	ITEM X	100	99	-1	\$10.00	(\$10.00)		
92218813298	ITEM Y	64	64	0	\$10.00	\$0.00		
92218813299	ITEM Z	28	25	-3	\$10.00	(\$30.00)		
63024998936	Lasergrip Standard Polymer Kall'Fol PSAT	73	73	0	\$125.00	\$0.00		
Total:		265	265	-4	\$155.00	(\$40.00)		

2. Review the report for issues that require attention or correction and update stocktaking data on the **Product Inventory Stocktaking** screen as needed.
3. Continue with the procedure below.

Note: When the **Submit** button is clicked, the **Variance Report** will not display discrepancies between the count and the QOH.

6. After all counts have been entered and loss/gains have been accounted for, click the **Submit** button to save all changes, and display a confirmation window.

All products in the Test Group 001 group have been updated. You will now return to the Inventory Count Group Setup screen.

Close

7. Click the **Close** button to close the window and display the **Inventory Groups** window in front of the **Product Inventory Stocktaking** screen.
8. Click the **Cancel** button to close the window and the screen.

Note: To view or print the saved information, refer to [View the Product Stock Adjustment Report \(see page 200\)](#).

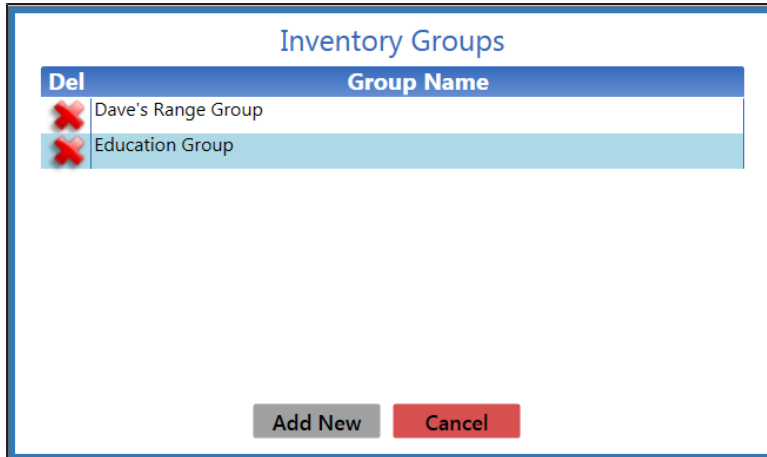
Import Inventory Stocktaking Data

Complete the following procedure to import stocktaking data into the **Product Inventory Stocktaking** screen by creating, populating, and importing a formatted Excel file.

1. Navigate to the **Product Inventory Stocktaking** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



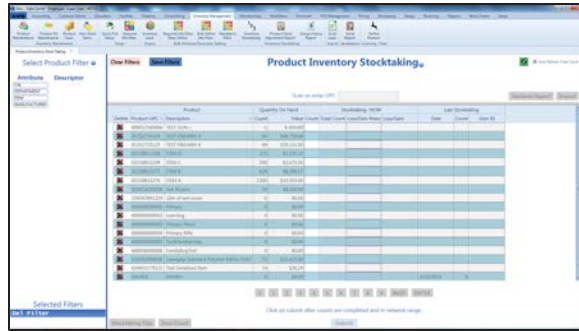
2. Select **Inventory Management > Inventory Stocktaking** from the main menu to display the **Inventory Groups** window in front of the **Product Maintenance** screen.



3. Complete one of the following procedures as appropriate to select the desired inventory group:

Create a New Inventory Group

1. Click the **Add New** button to close the **Inventory Groups** window and display the **Product Inventory Stocktaking** screen.



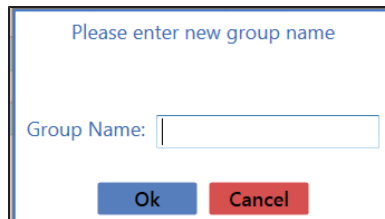
2. Complete the following procedure as needed to filter the items displayed on the screen with attribute/descriptor combinations:

1. Click an **Attribute** button and one of its associated **Descriptor** buttons to filter the items shown.
2. If needed, select another attribute/descriptor combination to further filter the list.

Note: To remove an unwanted filter (attribute/descriptor combination), click its **Delete** (red X) button in the **Selected Filters** list.

To remove all filters, click the **Clear Filters** button so a new search may be done.

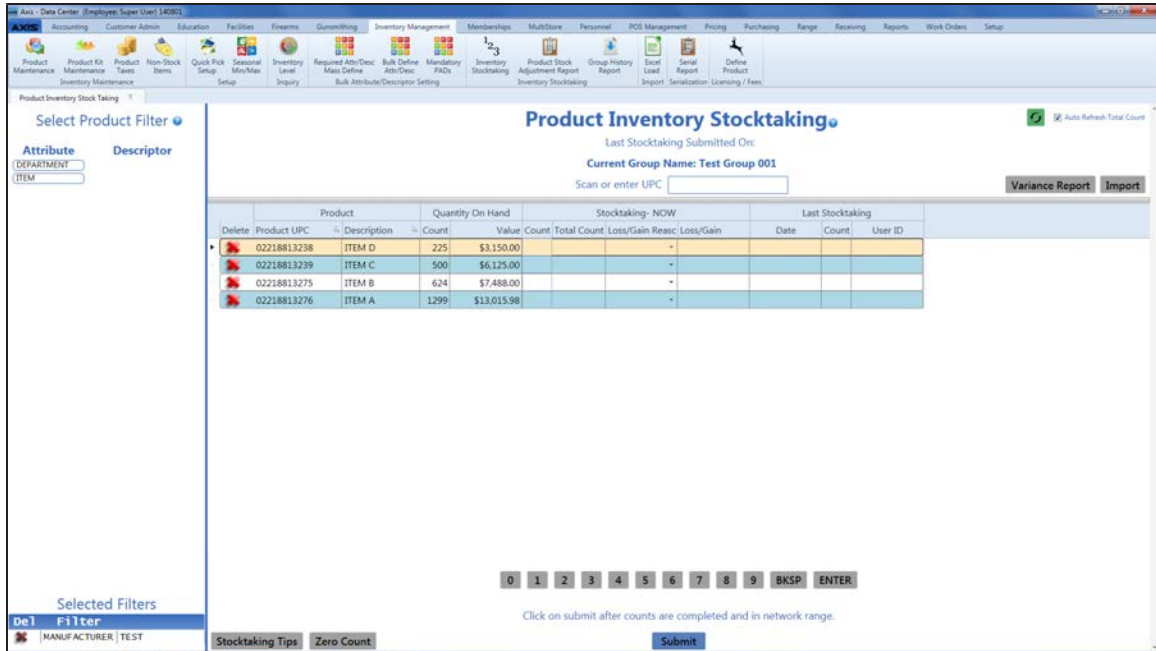
3. Click the **Save Filters** button to display the **Please enter new group name** window.

The screenshot shows a dialog box titled "Please enter new group name". It contains a text input field labeled "Group Name:". Below the input field are two buttons: "Ok" and "Cancel".

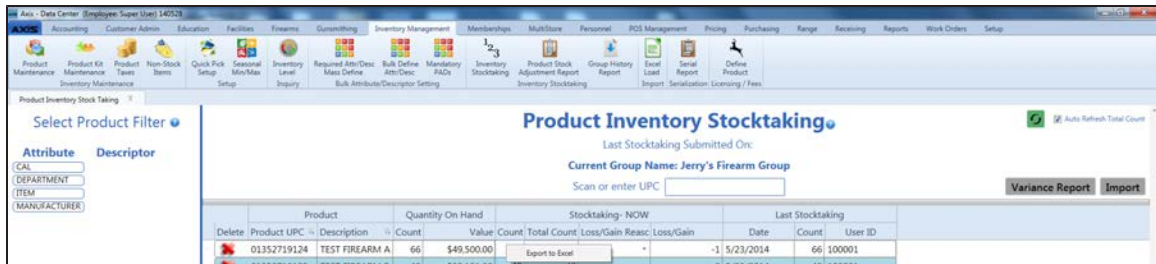
4. Enter a name for the inventory group in the **Group Name** field.
5. Click the **OK** button to create the group and close the **Inventory Groups** window. The **Product Inventory Stocktaking** screen will display the selected group name in the **Current Group Name:** heading.
6. Continue with the procedure below.

Select an Existing Inventory Group

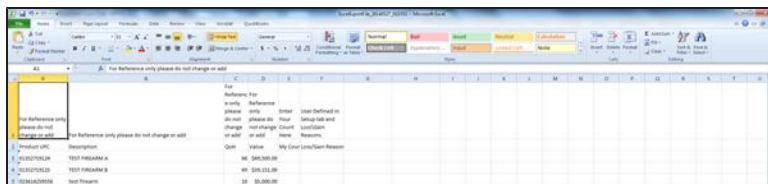
1. Double-click an inventory group name to select the group and close the **Inventory Groups** window. The **Product Inventory Stocktaking** screen will display the selected group name in the **Current Group Name:** heading.
2. Continue with the procedure below.



2. Right-click on the list to display an **Export to Excel** option.



3. Click the **Export to Excel** option to export the template format to an Excel file.



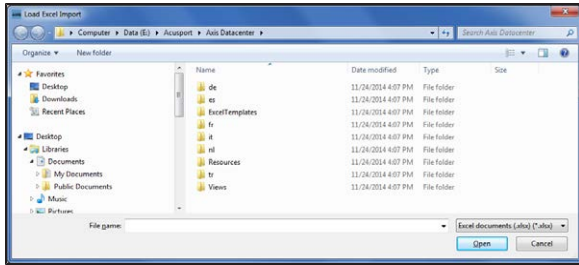
4. Populate the Excel file with stocktaking information.

Note: The file must adhere to the validation requirements indicated in row 1 and below:

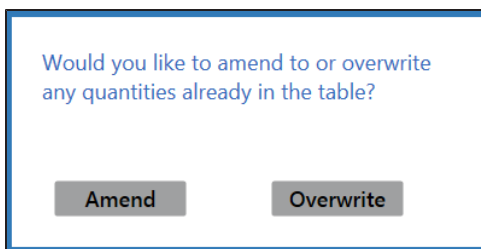
- All UPC's must be in the system database prior to upload.
- New counts may be entered in the **My Count** column.

- Any entry in the **Loss/Gain Reason** column must exactly match one of the reasons defined on the **Loss/Gain Reasons** screen. (Select **Setup > Loss/Gain Reasons** to view this screen.)

5. Save the Excel file.
6. Click the **Import** button on the **Product Inventory Stocktaking** screen to display the **Load Excel Import** window.



7. Browse to the desired location.
8. Double-click the saved Excel file to select it and start the import process.
9. The system displays an amend/overwrite selection window.

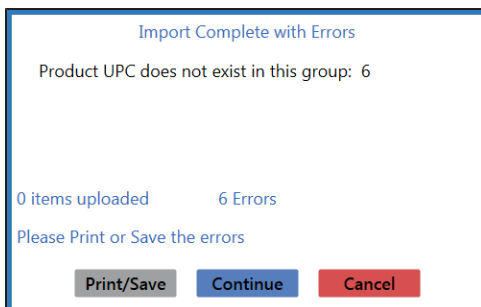


10. Complete one of the following procedures to close this window:

Note: No quantities are entered into the system at this point.

- Click the **Amend** button to add the counts in the Excel file to any counts already displayed on the **Product Inventory Stocktaking** screen.
- Click the **Overwrite** button to replace the counts displayed on the **Product Inventory Stocktaking** screen with the counts in the Excel file.

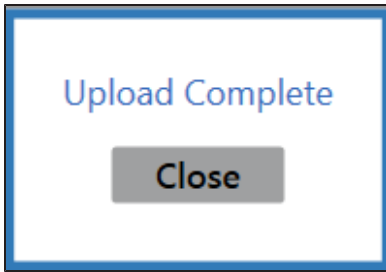
11. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to print and save the list of invalid UPCs with Description and Qty in the original format and return to this screen.
- Click the **Continue** button to continue with the import for the uploaded items.
- Click the **Cancel** button to cancel the import.

12. When the import is complete, the system displays the **Upload Complete** window.



13. Click the **Close** button to close the window.
14. Click the tab's **Close** button to close the screen.

View the Group History Report

Complete the following procedure to generate and view a record of inventory count group stocktaking counts.

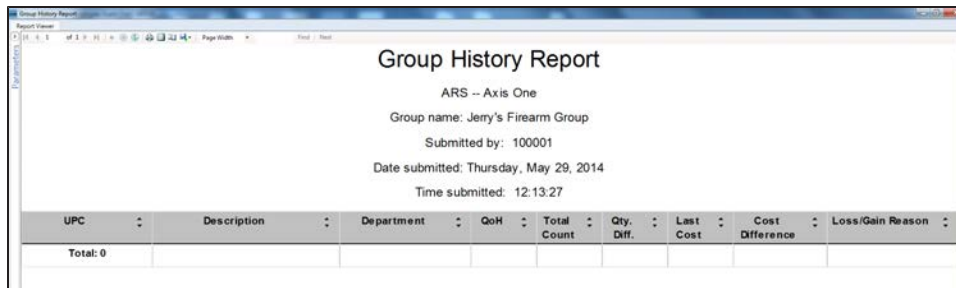
1. Navigate to the **Stock Taking Groups** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Group History Report** from the main menu to display the **Stock Taking Groups** screen.
3. Complete the following procedure to determine which group counts are displayed on the screen:
 1. Enter starting and ending dates in the **Date Range** fields to define the time frame.
 2. Click the **Submit** button to display selected group counts.



2. Click the **Execute Report** (green arrow) button beside a group name to display the group's report in the **Report Viewer** window.



3. Use the scroll bar(s) and or page controls as needed to view the entire report.
4. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

5. Click the **Close** button to close the **Report Viewer** window.

6. Click the tab's **Close** button to close the screen.

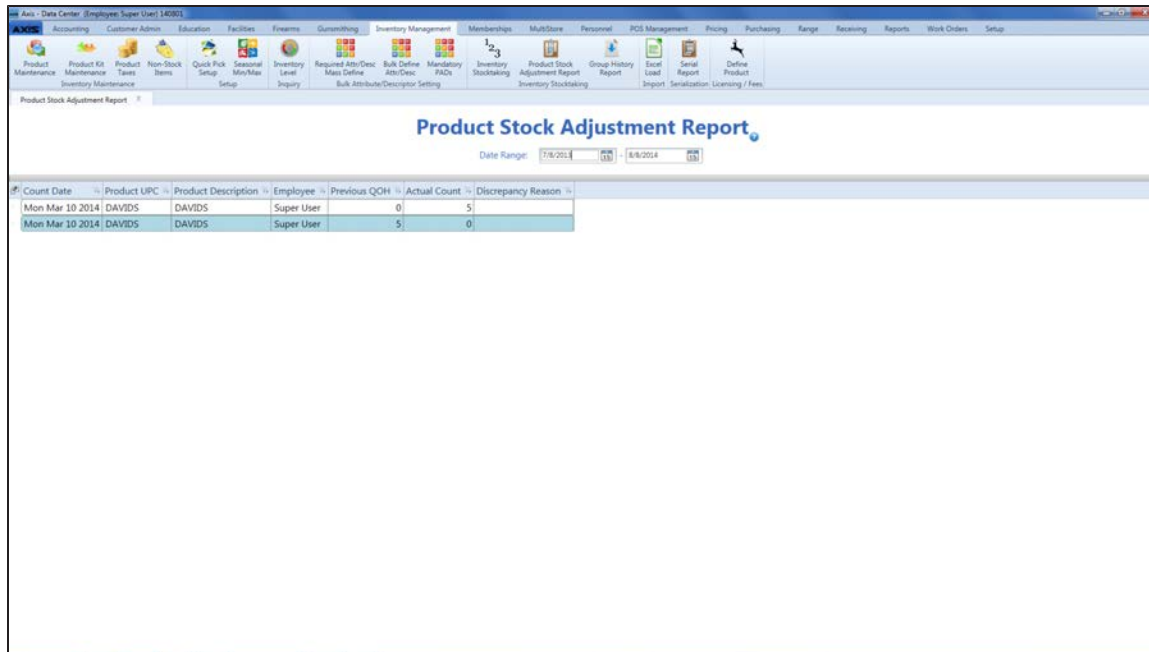
View the Product Stock Adjustment Report

1. Navigate to the **Product Stock Adjustment Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Inventory Management > Product Stock Adjustment Report** from the main menu to display the **Product Stock Adjustment Report** screen.
3. Select onscreen options to determine what products are displayed on the screen:
 - Enter starting and ending dates in the **Date Range** fields to define the time frame..
 - [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the tab's **Close** button to close the screen.

Firearms Management

This section contains procedures to document the acquisition and disposition of firearms, maintain Bound Books, perform firearm stocktaking, set up, maintain, and review range, lane, and waiver information, range products and rentals, and an assortment of useful statistical reports on range usage.

Document Firearm Acquisitions and Dispositions

Firearm acquisitions and dispositions may be documented for sales, purchases, trades, thefts, transfers, and consignments.

- [Document a Firearm Sale \(see page 203\)](#)
- [Document a Firearm Purchase \(see page 205\)](#)
- [Document a Firearm Trade \(see page 207\)](#)
- [Document a Firearm Theft \(see page 209\)](#)

Firearm Transfers

- [Document an Incoming Firearm Transfer \(see page 211\)](#)
- [Document an Outgoing Firearm Transfer \(see page 213\)](#)
- [Document an Interstore Firearm Transfer \(see page 215\)](#)

Firearm Consignments

- [Document an Incoming Consignment Firearm \(see page 217\)](#)
- [Document the Return of an Incoming Consignment Firearm \(see page 219\)](#)
- [View the Inbound Consignments Report \(see page 221\)](#)

Bound Book Features

Bound Book Features include procedures to set firearm transfer dates, view and edit firearm tracking (identification, acquisition, and disposition) information, print books (with or without audits), and view audit logs for the bound books.

- [Manage a Bound Book \(see page 224\)](#)
- [Import Bound Book Data \(see page 231\)](#)
- [View a Bound Book Archive \(see page 234\)](#)
- [View the Bound Book Audit Log Report \(see page 235\)](#)

Electronic 4473 Form Process

The Electronic 4473 Form provides a simple, interactive way for the retailer and customer to complete, process, and update the 4473 forms needed for a firearm transaction.

- [Oversee the Electronic 4473 Form Process \(see page 236\)](#)
- [Start a 4473 Form for a Customer \(see page 237\)](#)
- [Fill Out the Customer Portion of an Electronic 4473 Form \(see page 238\)](#)
- [Process a 4473 Form \(see page 239\)](#)
- [Update a 4473 Form Disposition \(see page 244\)](#)

- [View and Use a List of All 4473 Forms \(see page 246\)](#)
- [View and Use a List of Denied 4473 Forms \(see page 247\)](#)
- [Clear a Firearm Hold \(see page 248\)](#)

Firearm Labels

Firearm Labels may be printed for selected firearms (defined as a range of log numbers or transaction numbers) in any desired quantity.

- [Print Firearm Labels \(see page 249\)](#)

Firearm Physical Inventory Counts

Firearm Physical Inventory Counts are essential for verifying the physical presence of individual firearms in the store/warehouse and should be performed regularly (preferably once every thirty days).

- [Perform a Physical Inventory Count for Firearms \(see page 250\)](#)

Firearm Taxes

A Firearm Tax is defined as a tax type that applies to firearms transactions, whether a standard product tax type (e.g., state tax) or tax type created specifically for firearms.

- [Manage a Firearm Tax \(see page 251\)](#)

Firearm Reports

Firearm Reports provide up-to-date records of firearm inventory levels and transactions available with or without specific financial information.

- [View the Firearm Sales Report \(see page 252\)](#)
- [View the Firearm Transactions Report \(see page 254\)](#)
- [View and Update the Firearm Inventory With Costs Report \(see page 256\)](#)
- [View the Firearm Inventory Without Costs Report \(see page 258\)](#)
- [View and Update the Firearm Inventory Aging Report \(see page 259\)](#)

3310 Forms Feature

The 3310 Forms Feature provides the ability to generate, review, and send 3310-4 and 3310-12 forms (reporting multiple firearm sales) to the ATF and state/local authorities.

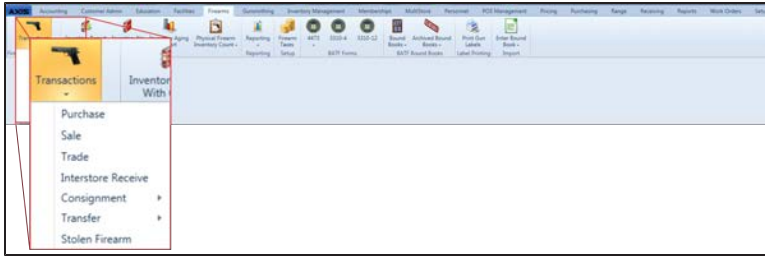
By default, the system generates 3310 forms every day at 10:45 p.m. If needed, a 3310 form may be manually generated, but this should only be done after business hours. For every day on which a 3310 form is generated, the system collects all generated 3310 forms from that date in a corresponding folder in the SharedPath on the AXIS server.

- [Generate, View, and Print 3310-4 Forms \(see page 261\)](#)
- [Generate, View, and Print 3310-12 Forms \(see page 263\)](#)

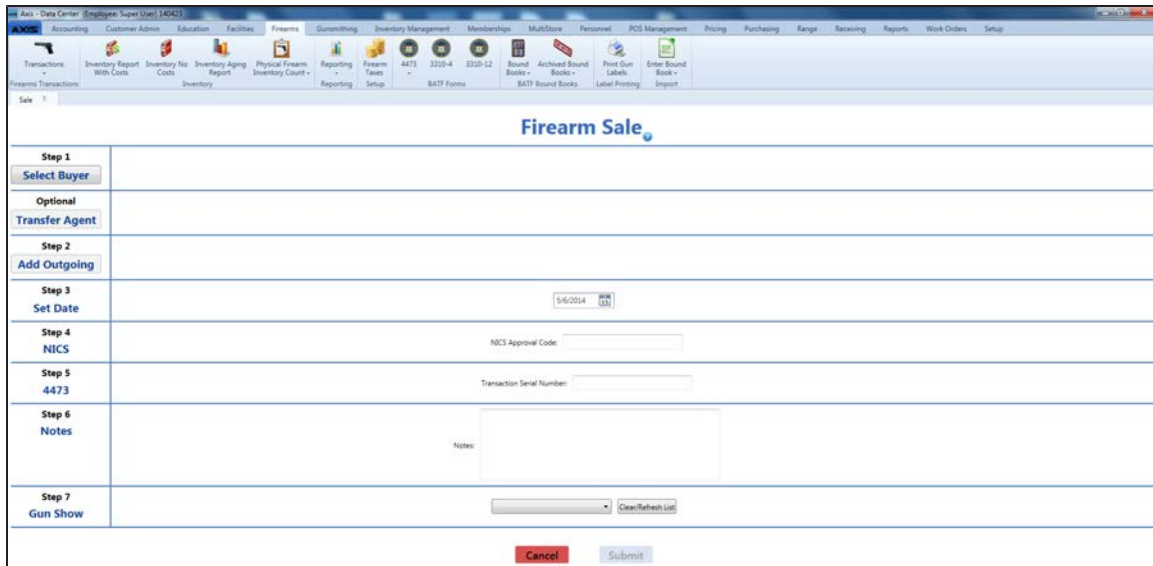
Document a Firearm Sale

1. Navigate to the **Firearm Sale** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Sale** from the main menu to display the **Firearm Sale** screen.



2. Complete this procedure to add buyer information:

1. Click the **Select Buyer** button to display the **Customer Look-up** window.
2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.

3. Complete this procedure if the transaction requires a transfer agent:

1. Click the **Transfer Agent** button to display the **Transfer Agent Look-up** window.
2. [Select a Transfer Agent \(see page 34\)](#).

4. Complete the following procedures as appropriate to add outgoing firearm information:

Add an Outgoing Firearm

1. Click the **Add Outgoing** button to display the **Firearm Inventory** window.
2. [Select a Firearm from the Firearm Inventory Window \(see page 36\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Outgoing Firearm's Price



1. Click the firearm's **Edit** button to display a new price entry window.
2. Enter a new price in the field.
3. Click the **OK** button to display the updated price on the screen.

Remove an Outgoing Firearm from the Screen



Click the firearm's **Delete** button to remove it from the screen.

5. Complete the remaining fields:

1. Enter the transaction date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.

Note: This is the date of the transaction, not the date of the disposition.

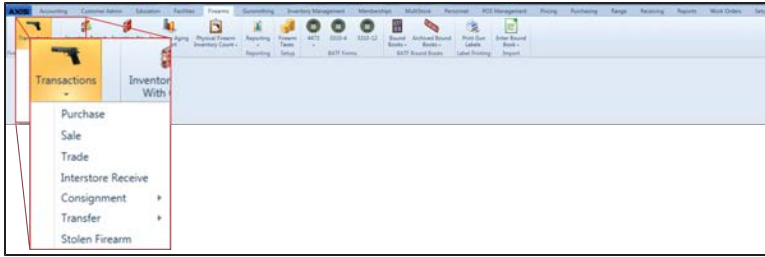
2. Enter the NICS approval code in the **NICS Approval Code** field.
3. Enter the transaction serial number in the **Transaction Serial Number** field.
4. If needed, enter transaction notes in the **Notes** field.
5. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.

Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to [Manage Gun Show Information \(see page 76\)](#) for more information.

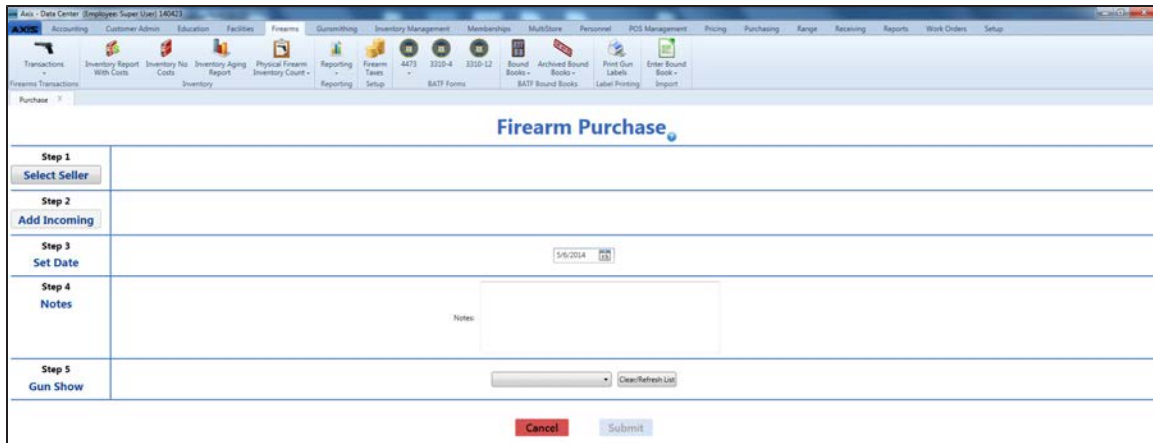
6. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

Document a Firearm Purchase

1. Navigate to the **Firearm Purchase** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Purchase** from the main menu to display the **Firearm Purchase** screen.



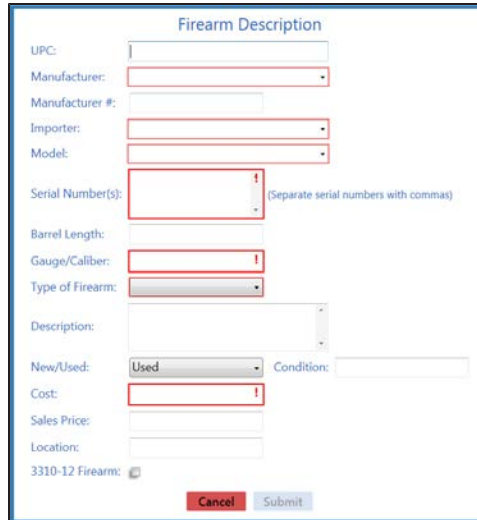
2. Complete this procedure to add seller information:
 1. Click the **Select Seller** button to display the **Customer Look-up** window.
 2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.

3. Complete the following procedures as appropriate to add incoming firearm information:

Add an Incoming Firearm

1. Click the **Add Incoming** button to display the **Firearm Description** window.



2. Describe a Firearm (see page 37). (Repeat steps as needed to add additional firearms.)

Edit an Incoming Firearm's Description



Firearm Purchase					
Hazel Notes					
Step 1					
Select Seller					
Step 2	Manufacturer	Model	S/N	Cost	
Add Incoming	GLOCK	Model A	588745	\$200.00	
	GLOCK	Model A	858456	\$200.00	

1. Click the firearm's **Edit** button to display its **Firearm Description** window.
2. Describe a Firearm (see page 37) as needed.

Remove an Incoming Firearm from the Screen



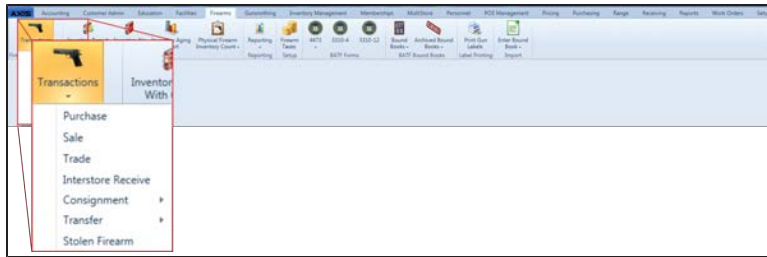
Firearm Purchase					
Hazel Notes					
Step 1					
Select Seller					
Step 2	Manufacturer	Model	S/N	Cost	
Add Incoming	GLOCK	Model A	588745	\$200.00	
	GLOCK	Model A	858456	\$200.00	

Click the firearm's **Delete** button to remove it from the screen.

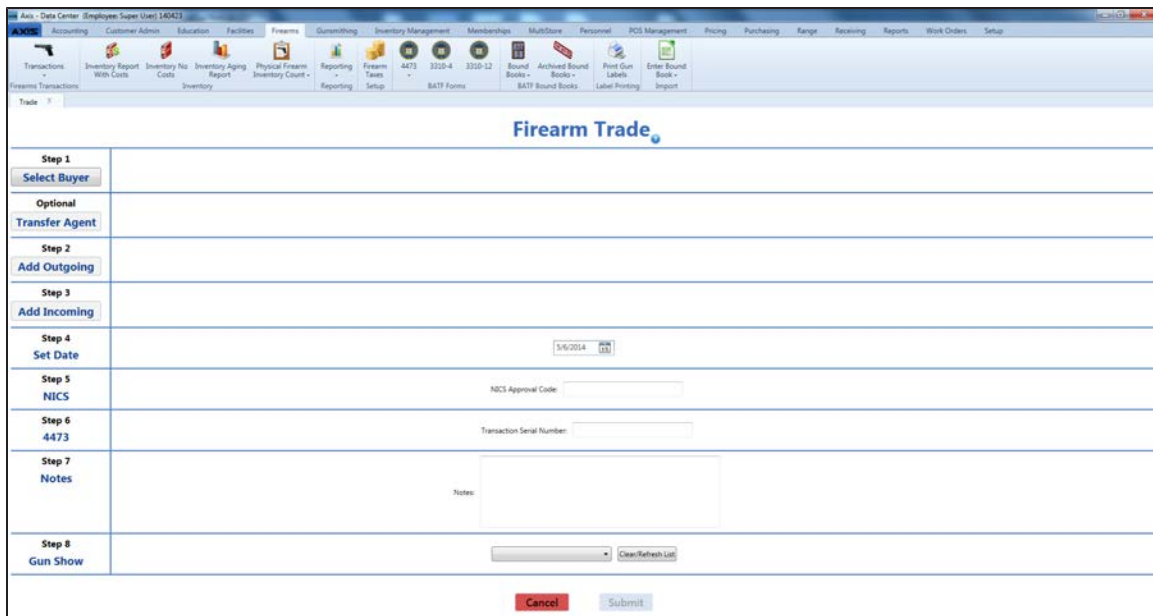
4. Complete the remaining fields:
 1. Enter the transaction date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button in the **Set Date** field.
Note: This is the date of the acquisition.
 2. If needed, enter transaction notes in the **Notes** field.
 3. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.
Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to Manage Gun Show Information (see page 76) for more information.
5. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

Document a Firearm Trade

1. Navigate to the **Firearm Trade** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Trade** from the main menu to display the **Firearm Trade** screen.



2. Complete this procedure to add buyer information:
 1. Click the **Select Buyer** button to display the **Customer Look-up** window.
 2. [Select or Add a Firearm Customer \(see page 29\)](#).
3. Complete this procedure if the transaction requires a transfer agent:
 1. Click the **Transfer Agent** button to display the **Transfer Agent Look-up** window.
 2. [Select a Transfer Agent \(see page 34\)](#).
4. Complete the following procedures as appropriate to add outgoing firearm information:

Add an Outgoing Firearm

1. Click the **Add Outgoing** button to display the **Firearm Inventory** window.
2. [Select a Firearm from the Firearm Inventory Window \(see page 36\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Outgoing Firearm's Price

1. Click the firearm's **Edit** button to display a new price entry window.
2. Enter a new price in the field.
3. Click the **OK** button to display the updated price on the screen.

Remove an Outgoing Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

-
5. Complete the following procedures as appropriate to add incoming firearm information:

Add an Incoming Firearm

1. Click the **Add Incoming** button to display the **Firearm Description** window.
2. [Describe a Firearm \(see page 37\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Incoming Firearm's Description

1. Click the firearm's **Edit** button to display its **Firearm Description** window.
2. [Describe a Firearm \(see page 37\)](#) as needed.

Remove an Incoming Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

-
6. Complete the remaining fields:

1. Enter the transaction date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.

Note: This is the date of the transaction, not the date of the disposition.

2. Enter the NICS approval code in the **NICS Approval Code** field.
3. Enter the transaction serial number in the **Transaction Serial Number** field.
4. If needed, enter transaction notes in the **Notes** field.
5. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.

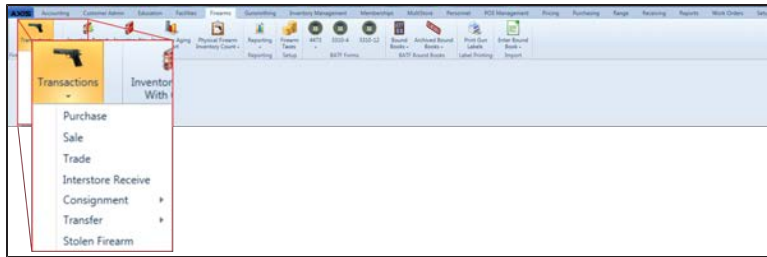
Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to [Manage Gun Show Information \(see page 76\)](#) for more information.

7. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

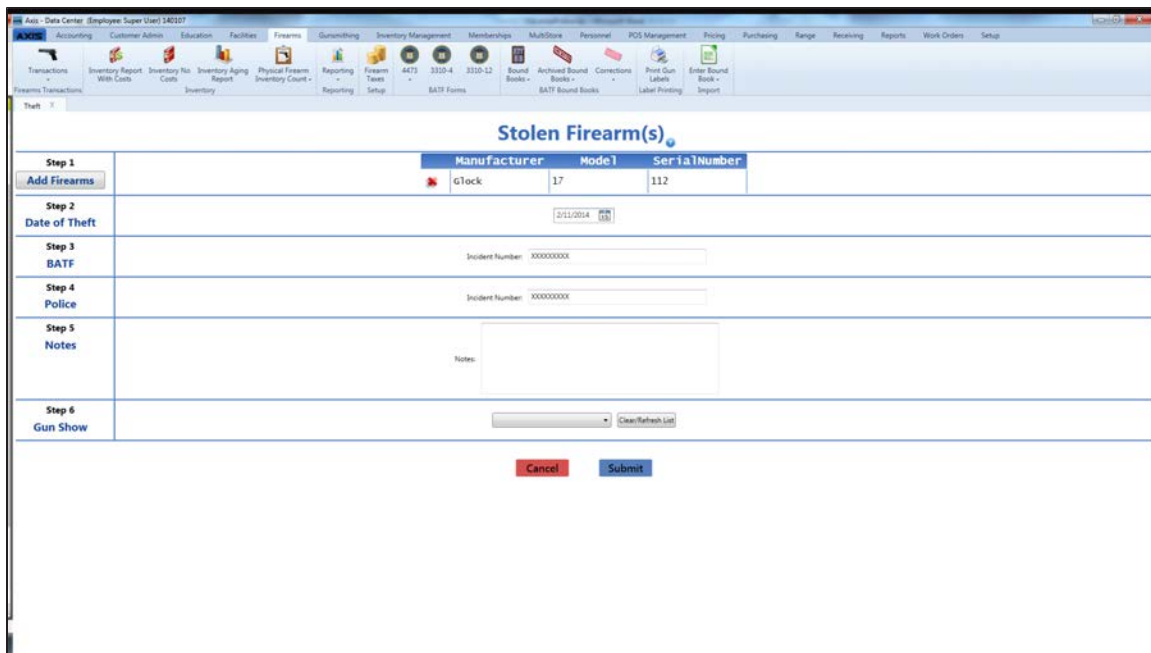
Document a Firearm Theft

1. Navigate to the **Stolen Firearm** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Stolen Firearm** from the main menu to display the **Stolen Firearm** screen.



2. Complete the following procedures as appropriate to add stolen firearm information:

Add a Firearm

1. Click the **Add Firearms** button to display the **Firearm Inventory** window.
2. [Select a Firearm from the Firearm Inventory Window \(see page 36\)](#). (Repeat steps as needed to add additional firearms.)

Edit a Firearm's Price

1. Click the firearm's **Edit** button to display a new price entry window.
2. Enter a new price in the field.
3. Click the **OK** button to display the updated price on the screen.

Remove a Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

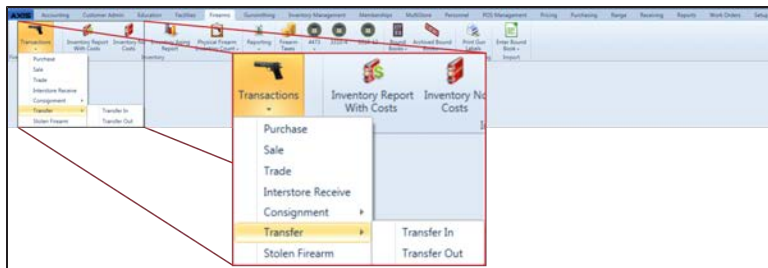
3. Complete the remaining fields:
 1. Enter the theft date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Date of Theft** field.
 2. Enter the BATF incident number in the **BATF Incident Number** field.
 3. Enter the Police incident number in the **Police Incident Number** field.
 4. If needed, enter notes in the **Notes** field.
 5. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.

Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to [Manage Gun Show Information \(see page 76\)](#) for more information.
4. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

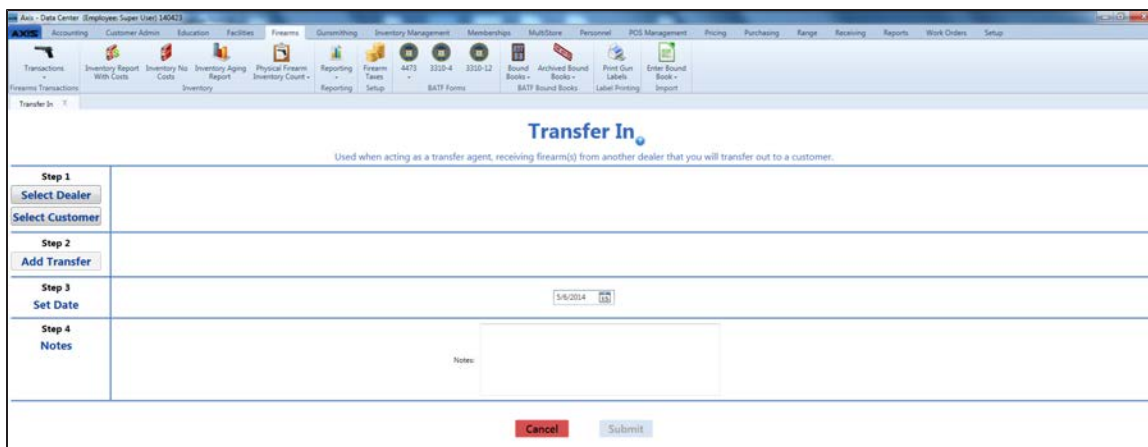
Document an Incoming Firearm Transfer

1. Navigate to the **Transfer In** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Transfer > Transfer In** from the main menu to display the **Transfer In** screen.



2. Complete the following procedures as appropriate to add the transferring party's information:

Transfer from a Customer

1. Click the **Select Customer** button to display the **Customer Look-up** window.
2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.

Transfer from a Dealer

1. Click the **Select Dealer** button to display the **Vendor Look-up** window.
2. [Select a Firearm Vendor \(see page 32\)](#).

3. Complete the following procedures as appropriate to add incoming transfer firearm information:

Add an Incoming Firearm

1. Click the **Add Transfer** button to display the **Firearm Description** window.
2. [Describe a Firearm \(see page 37\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Incoming Firearm's Description

1. Click the firearm's **Edit** button to display its **Firearm Description** window.
 2. [Describe a Firearm \(see page 37\)](#) as needed.
-

Remove an Incoming Firearm from the Screen

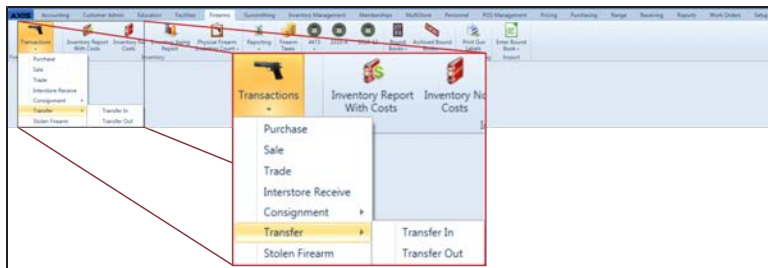
Click the firearm's **Delete** button to remove it from the screen.

4. Complete the remaining fields:
 1. Enter the acquisition date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.
Note: This is the date of the transaction, not the date of the disposition.
 2. If needed, enter transaction notes in the **Notes** field.
5. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

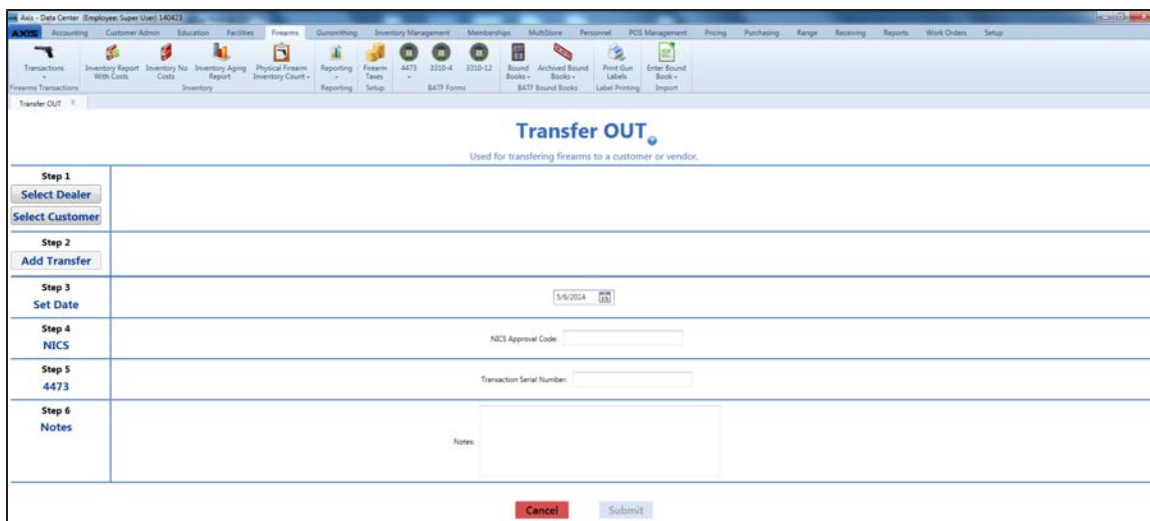
Document an Outgoing Firearm Transfer

1. Navigate to the **Transfer Out** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Transfer > Transfer Out** from the main menu to display the **Transfer Out** screen.



2. Complete the following procedures as appropriate to add the transfer-receiving party's information:

Transfer to a Customer

1. Click the **Select Customer** button to display the **Customer Look-up** window.
2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.

Transfer to a Dealer

1. Click the **Select Dealer** button to display the **Vendor Look-up** window.
2. [Select a Firearm Vendor \(see page 32\)](#).

3. Complete the following procedures as appropriate to add outgoing transfer firearm information:

Add an Outgoing Firearm

1. Click the **Add Outgoing** button to display the **Firearm Inventory** window.
2. [Select a Firearm from the Firearm Inventory Window \(see page 36\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Outgoing Firearm's Price

1. Click the firearm's **Edit** button to display a new price entry window.
2. Enter a new price in the field.
3. Click the **OK** button to display the updated price on the screen.

Remove an Outgoing Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

4. Complete the remaining fields:

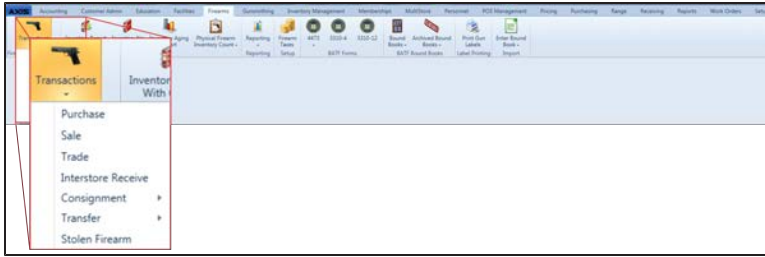
1. Enter the transaction date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.

Note: This is the date of the transaction, not the date of the disposition.

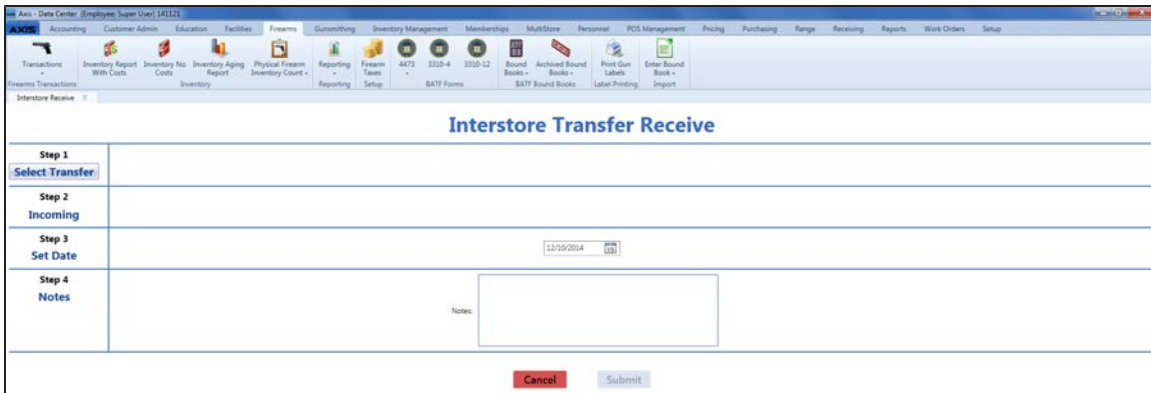
2. Enter the NICS approval code in the **NICS Approval Code** field.
 3. Enter the transaction serial number in the **Transaction Serial Number** field.
 4. If needed, enter transaction notes in the **Notes** field.
5. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

Document an Interstore Firearm Transfer

1. Navigate to the **Interstore Transfer Receive** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Interstore Receive** from the main menu to display the **Interstore Transfer Receive** screen.



2. Click the **Select Transfer** button to display the **Interstore Transfers** window.

The screenshot shows the 'Interstore Transfers' window with a table of transfer records. The table has the following columns: Transaction Number, Store Name, Ship Date, and Firearm Count.

Transaction Number	Store Name	Ship Date	Firearm Count
40004	Store 001	6/13/2013 12:20:29 PM	1
40005	Store 001	6/18/2013 11:06:56 AM	2
40006	Store 001	6/18/2013 11:10:27 AM	2
40007	Store 001	6/18/2013 3:18:49 PM	1
40008	Store 001	6/18/2013 4:49:35 PM	1
40013	Store 001	6/19/2013 2:29:13 PM	1
40014	Store 001	6/19/2013 2:29:37 PM	1
40017	Store 001	6/20/2013 8:41:44 AM	1
50016	Store 001	3/10/2014 8:52:07 AM	1

At the bottom of the window are 'Cancel' and 'Submit' buttons.

3. Click a firearm to display its transfer record.

Transaction Number	Store Name	Ship Date	Firearm Count
40004	Store 001	6/13/2013 12:20:29 PM	1
40005	Store 001	6/18/2013 11:06:56 AM	2
40006	Store 001	6/18/2013 11:10:27 AM	2
40007	Store 001	6/18/2013 3:18:49 PM	1
40008	Store 001	6/18/2013 4:49:35 PM	1
40013	Store 001	6/19/2013 2:29:11 PM	1
40014	Store 001	6/19/2013 2:29:37 PM	1
40017	Store 001	6/20/2013 8:41:44 AM	1
50016	Store 001	3/10/2014 8:52:07 AM	1

Manufacturer	Model	Serial Number	Price
COLT	COLT XYZ	B600	\$850.00

- Click the **Submit** button to add transfer and firearm information to the **Interstore Transfer Receive** screen.

- Complete the following procedures as appropriate to add incoming transfer firearm information:

Edit an Incoming Firearm's Description

- Click the firearm's **Edit** button to display its **Firearm Description** window.
- [Describe a Firearm \(see page 37\)](#) as needed.

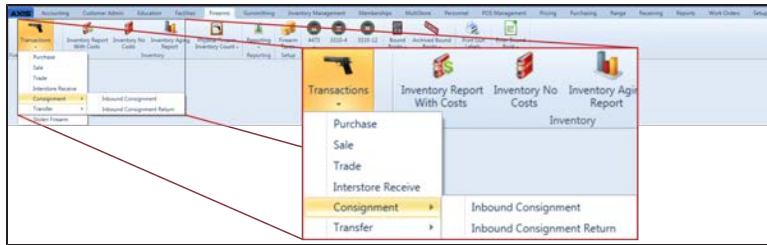
Remove an Incoming Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

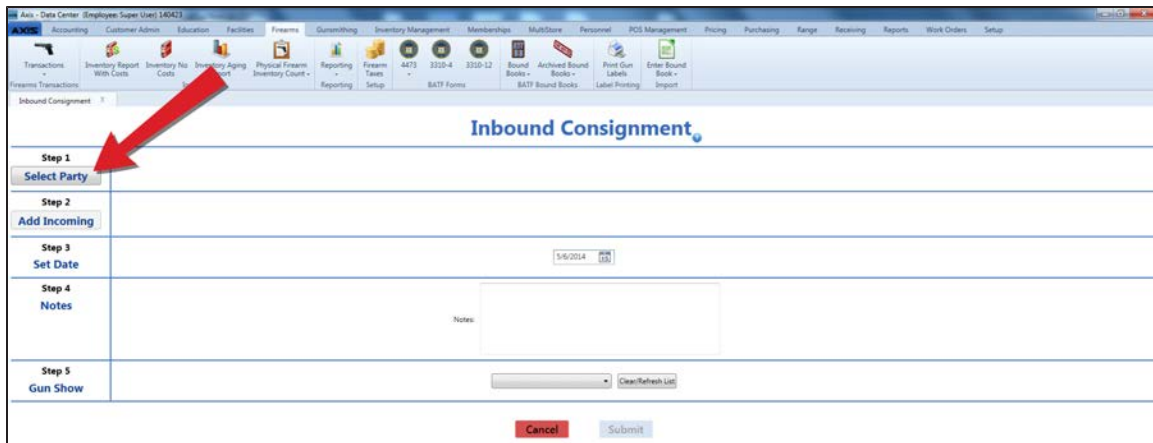
- Complete the remaining fields:
 - Enter the acquisition date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.
 - If needed, enter transaction notes in the **Notes** field.
- Click the **Submit** button to add the firearm to the receiving store's inventory.

Document an Incoming Consignment Firearm

1. Navigate to the **Inbound Consignment** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Consignment > Inbound Consignment** from the main menu to display the **Inbound Consignment** screen.



2. Complete this procedure to add party information:
 1. Click the **Select Party** button to display the **Customer Look-up** window.
 2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.

3. Complete the following procedures as appropriate to add incoming firearm information:

Add an Incoming Firearm

1. Click the **Add Incoming** button to display the **Firearm Description** window.
2. [Describe a Firearm \(see page 37\)](#). (Repeat steps as needed to add additional firearms.)

Edit an Incoming Firearm's Description

1. Click the firearm's **Edit** button to display its **Firearm Description** window.
2. [Describe a Firearm \(see page 37\)](#) as needed.

Remove an Incoming Firearm from the Screen

Click the firearm's **Delete** button to remove it from the screen.

4. Complete the remaining fields:

1. Enter the transaction date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.

Note: This is the date of the transaction, not the date of the disposition.

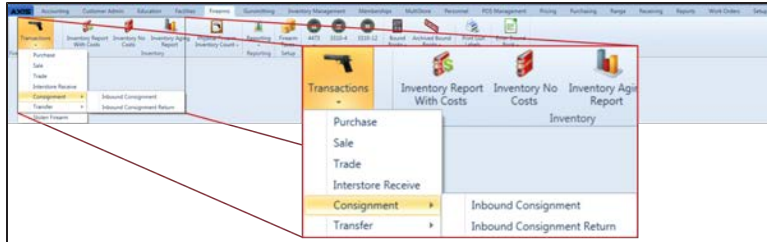
2. If needed, enter transaction notes in the **Notes** field.
3. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.

Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to [Manage Gun Show Information \(see page 76\)](#) for more information.

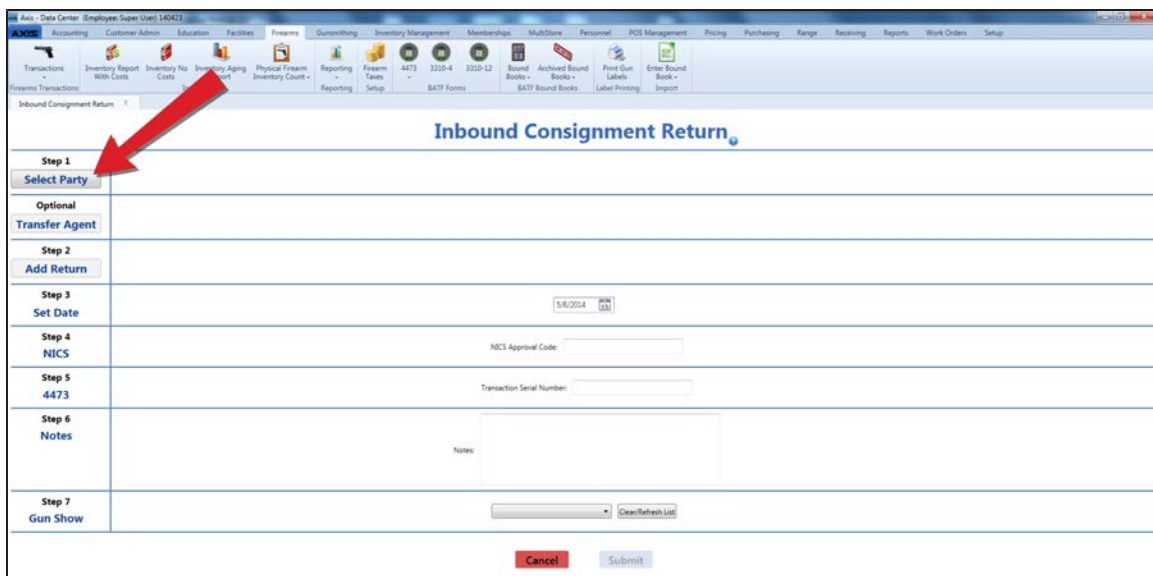
5. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

Document the Return of an Incoming Consignment Firearm

1. Navigate to the **Inbound Consignment Return** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Transactions > Consignment > Inbound Consignment Return** from the main menu to display the **Inbound Consignment Return** screen.



2. Complete this procedure to add party information:
 1. Click the **Select Party** button to display the **Customer Look-up** window.
 2. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.
3. Complete this procedure if the transaction requires a transfer agent:
 1. Click the **Transfer Agent** button to display the **Transfer Agent Look-up** window.
 2. [Select a Transfer Agent \(see page 34\)](#).
4. Complete this procedure to add firearm information:
 1. Click the **Add Return** button to display the **Firearm Inventory** window.
 2. Complete one of the following procedures to select a firearm:
 - Scan the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Enter the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Locate the firearm in the list and check its **Select** checkbox.
 3. Repeat steps as needed to reattempt a failed selection and/or select additional firearms.

4. Click the **Submit** button.

Note: If needed, click a firearm's **Delete** button. to remove it from the screen.

5. Complete the remaining fields:

1. Enter the transaction date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Date** field.

Note: This is the date of the transaction, not the date of the disposition.

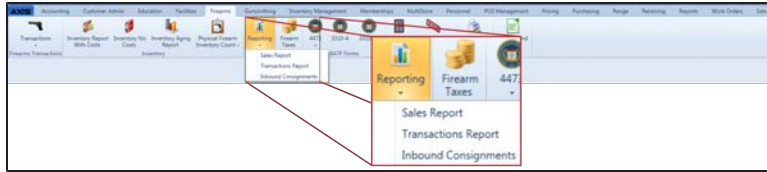
2. Enter the NICS approval code in the **NICS Approval Code** field.
3. Enter the transaction serial number in the **Transaction Serial Number** field.
4. If needed, enter transaction notes in the **Notes** field.
5. If the transaction occurred at a gun show, select the gun show from the **Gun Show** drop-down field.

Note: If the gun show is not available in the drop-down, create it before completing this firearm transaction. Refer to [Manage Gun Show Information \(see page 76\)](#) for more information.

6. Click the **Submit** button to send the transaction to the customer's **Current** record in the **Register** application for processing and payments.

View the Inbound Consignments Report

1. Navigate to the **Inbound Consignments** (report) screen.
 1. [Log In to the Data Center Application](#) (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Reporting > Inbound Consignments** from the main menu to display the **Inbound Consignments** screen.

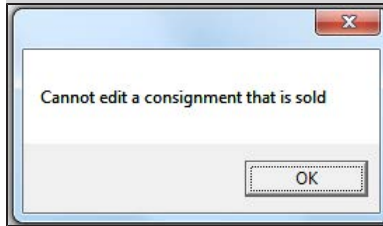


2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Click the **Refresh** button to display recent updates.
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data](#) (see page 40).
3. Complete the following procedures as appropriate to add consignment item information:

Edit an Unsold Inbound Consignment Item

1. Click the consignment's **Edit** button to display the **Edit Consignment** window.

Note: If the consignment has been sold, a notification window appears.



Click the **OK** button to close the window.

A screenshot of the "Edit Consignment" window. It features three input fields: "Consignment Fee" with radio buttons for "Fixed" and "Percentage" and a text field containing "0.1500"; "Minimum Amount" with a text field containing "\$135.00"; and "Sales Price" with a text field containing "\$199.00". At the bottom are "Cancel" and "Submit" buttons.

2. Edit Consignment information in the window.

Consignment Fee	Select Fixed or Percentage to determine how the consignment fee is calculated.
Amount	If the selected Consignment Fee is Fixed , enter a fixed amount with no dollar sign and two decimal places (0.00) in the Amount field. If the selected Consignment Fee is Percentage , enter the percentage amount in the form of a decimal (.2 instead of 20%) in the Percentage field.
Minimum Amount	Enter the minimum amount for which the firearm may be sold.
Sales Price	Enter the price for the firearm. Note: If no price is entered, a price will have to be entered at the time of sale.

3. Click the **Submit** button to close the **Edit Consignment** window.

Review Sales Information for an Inbound Consignment Item

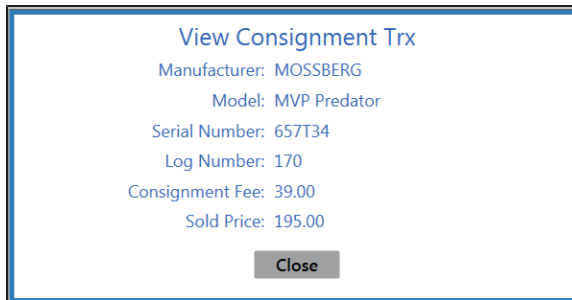


1. Click the consignment's **View** button to display its **View Consignment Trx** window.

Note: If the consignment has not yet been sold, a notification window appears.



Click the **OK** button to close the window.



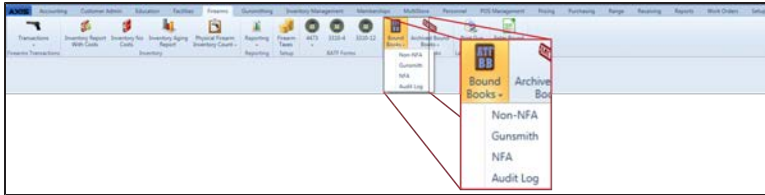
2. Click the **Close** button to close the **View Consignment Trx** window.

4. Click the tab's **Close** button to close the screen.

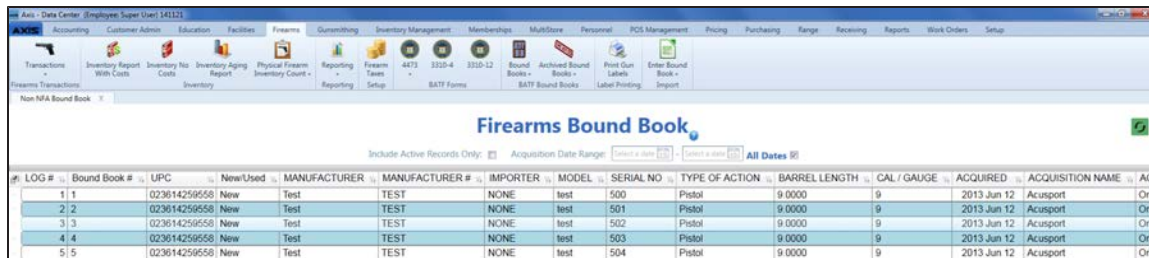
Manage a Bound Book

1. Navigate to the desired **Bound Book** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Bound Books** to display a menu of options.
3. Click the desired Bound Book option (**Non-NFA**, **Gunsmith**, or **NFA**) to display the associated **Bound Book** screen.



2. Complete the following procedures as needed to modify the list of records displayed on the screen:
 - Check the **Include Active Records Only** checkbox to display only active records.
 - Enter starting and ending dates in the **Acquisition Date Range** fields and press the **Enter** key to display results from that time frame.
 - Click the **Refresh** button to display recent updates.
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedure to manage an individual firearm record in the bound book:
 1. Click the firearm record to display its **Information for Log #** window.
 - If the record displays the highest/last **Bound Book #** associated with a given **Log #**, it is the active record for that firearm. The system will display its **Information for Log #** window.

Note: Refer to [Modify a Firearm Record](#) for information on modifying this record.

- If the record displays a **Bound Book #** that is lower/earlier than another associated with the same **Log #**, it is an inactive record for that firearm and cannot be modified. The system will display a grayed out **Information for Log #** window. This window displays only historical information and the record cannot be modified.
2. Complete the following procedures as appropriate to update the firearm record:

Modify a Firearm Record

Complete this procedure to modify firearm, acquisition, or disposition information in a firearm record.

1. Make changes to the appropriate fields as needed.

Note: Changes made will not be saved unless the **Save Changes** button is clicked and confirmed.

Note: Changes to the following fields will cause the system to deactivate the current record and create a new record to reflect the modified information.

- In the **Firearm Information** section:
Manufacturer, Importer, Model, Serial Number, Gauge/Caliber, and Type of Firearm
- In the **Acquisition Information** section:
Acquisition Date, Company, First, Middle, Last, Address, City, State, Zip, and FFL #
- In the **Disposition Information** section:
Transferred Date, Company, First, Middle, Last, Address, City, State, Zip, and FFL #

2. Continue with the procedure below.

Set a Firearm Transfer Date

Complete the following procedure to establish a firearm's transfer date in the Bound Book.

Note: Per the ATF, the transfer date is the actual date the customer takes possession of the firearm. The transfer date cannot be set until after the customer has paid for and taken possession of a firearm at the register. Manually setting a transfer date will cause the system to deactivate the current record and create a new record to reflect the modified information.

1. Enter the transfer date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Transferred Date** field.

Note: Changes made will not be saved unless the **Save Changes** button is clicked and confirmed.

2. Continue with the procedure below.

Delete a Firearm Record's Disposition Information

Complete this procedure to delete a firearm record's disposition information and make it available for sale again.

Note: This procedure will cause the system to deactivate the current record and create a new record to reflect the modified information.

1. Click the **Delete Disposition** button to clear all fields in the **Disposition Information** section of the **Information for Log #** window.

Note: Changes made will not be saved unless the **Save Changes** button is clicked and confirmed.

2. Continue with the procedure below.

Delete a Firearm Record

Complete this procedure to delete a firearm record from a bound book and create an empty record.

Note: This procedure will cause the system to deactivate the current record and create a new record to reflect the modified information.

1. Click the **Delete Record** button to clear all the fields in the **Information for Log #** window.

Note: Changes made will not be saved unless the **Save Changes** button is clicked and confirmed.

2. Continue with the procedure below.

Print a Label from a Firearm Record

1. Click the **Print Label** button to print a label for the firearm.
2. Click the **Close** button to close the **Information for Log #** window.
3. Click the tab's **Close** button to close the screen.

3. Click the **Save Changes** button to display a confirmation window.

Note: If the changes do not require the current record to be deactivated, the system updates the record and displays it in the **Information for Log #** window. Click the **Close** button to close the **Information for Log #** window.

Warning! Any changes made to this log # will cause a new log # to be created, notes to be added, and the original entry will be deactivated. The original entry will still print in the bound book, but will no longer be editable. Please click 'Close' to end the process, or make all required changes to Firearm Information, Acquisition Information, and Disposition Information. Click 'Save Changes' to create the new record.

Save Changes Close

4. Click the **Save Changes** button in the confirmation window to deactivate the current record, create a new record with the modified information and a new, system-generated **Bound Book #**, and generate **Notes** for both records.

Note: The new record's number will be the current record's number with the next sequential letter. (For example, if a firearm record with **Bound Book # 1001** were manually changed, the newly generated record would be assigned **Bound Book # 1001A**. If this record were changed, the new record would be assigned **Bound Book # 1001B**.)

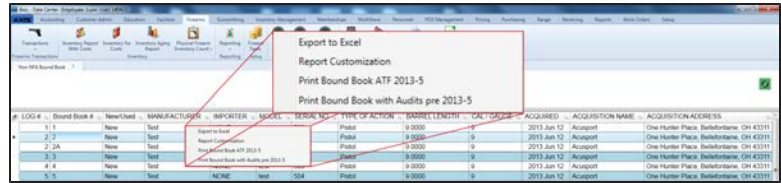
LOG #	B	Used	MANUFACTURER	IMPORTER	MODEL	SERIAL NO.	TYPE OF ACTION	BARREL LENGTH	CAL / GAUGE	ACQUIRED	ACQUISITION NAME	ACQUISITION ADDRESS
1	1	Test	NONE	test	500	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311	
2	2	New	Test	NONE	test	501	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311
2	2A	New	Test	NONE	test	501	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311
3	3	New	Test	NONE	test	502	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311
4	4	New	Test	NONE	test	503	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311

4. Complete the following procedures as appropriate to manage the bound book as a whole:

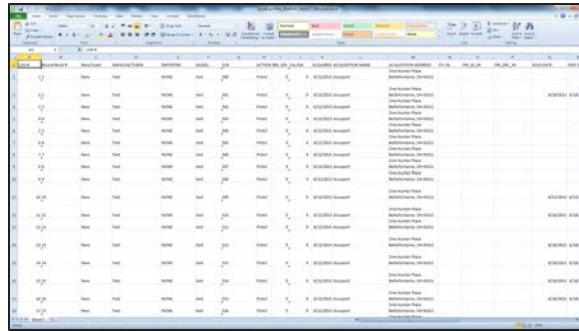
Export a Bound Book to Excel

Complete the following procedure to export an onscreen Bound Book to an Excel file.

1. Right-click on the list to display a menu of options.



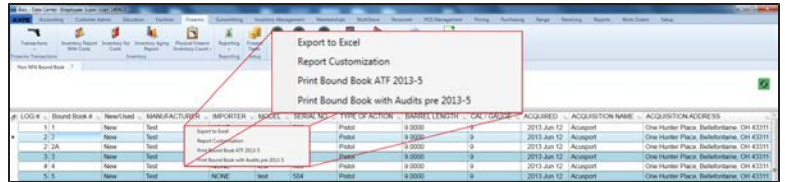
2. Click the **Export to Excel** option to open the Excel program and display the report as a spreadsheet.



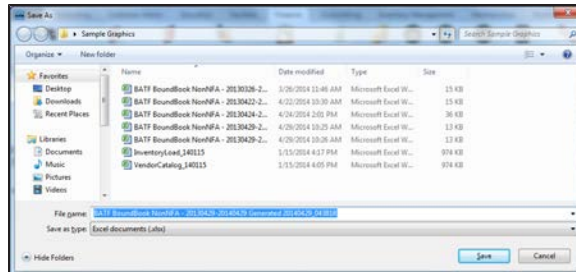
3. Select **File > Save As** from the menu bar to display the **Save As** window.
4. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the spreadsheet as needed.

Print a Bound Book

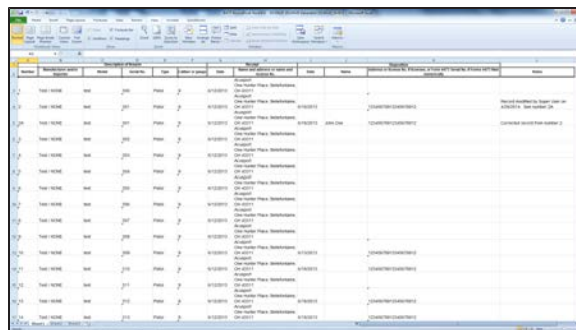
1. Right-click on the list to display a menu of options.



2. Click the **Print Bound Book ATF 2013-5** option to display the **Save As** menu.



3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document as an electronic file and open it for viewing.

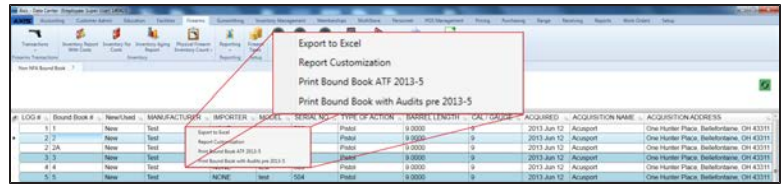


6. Select **File > Print** from the menu bar to display print controls.
7. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
8. Click the **Print** button to print the document.
9. Select **File > Close** from the menu bar to close the document.

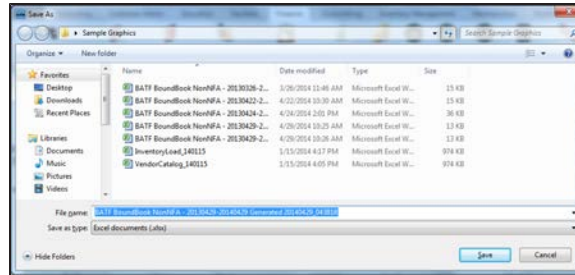
Print a Bound Book with Audits

Note: This procedure produces a version of the Bound Book that may be useful for informational purposes but is not compliant with ATF regulations.

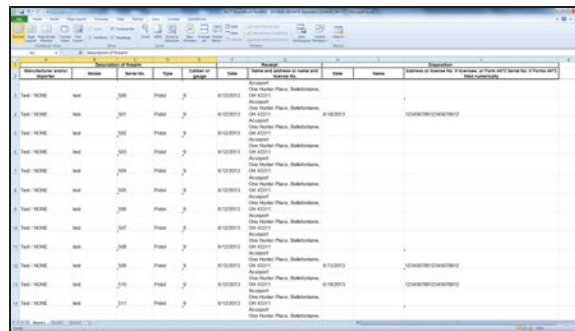
1. Right-click on the list to display a menu of options.



2. Click the **Print Bound Book with Audits pre ATF 2013-5** option to display the **Save As** menu.



3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document as an electronic file and open it for viewing.



6. Select **File > Print** from the menu bar to display print controls.
7. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
8. Click the **Print** button to print the document.
9. Select **File > Close** from the menu bar to close the document.

5. Click the tab's **Close** button to close the screen.

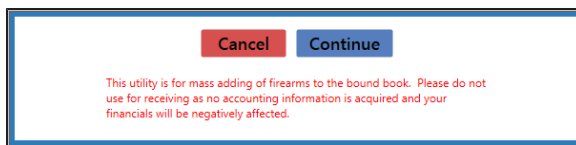
Import Bound Book Data

Complete the following procedure to import firearm data into a Bound Book by creating, populating, and importing a formatted Excel file.

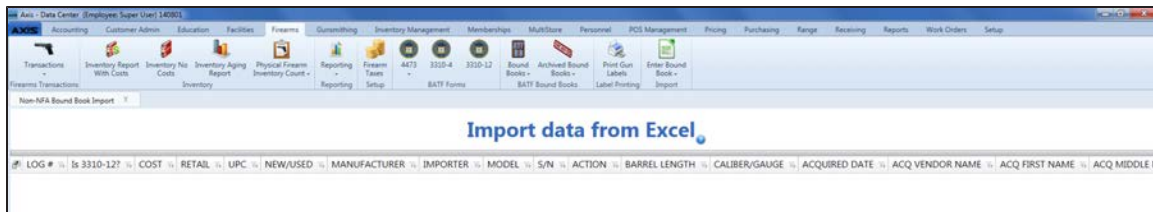
1. Navigate to the desired **Import data from Excel** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Enter Bound Book** to display a menu of options.
3. Click the desired option (**Non-NFA, Gunsmith, or NFA**) to display a warning window in front of the associated **Import data from Excel** screen.



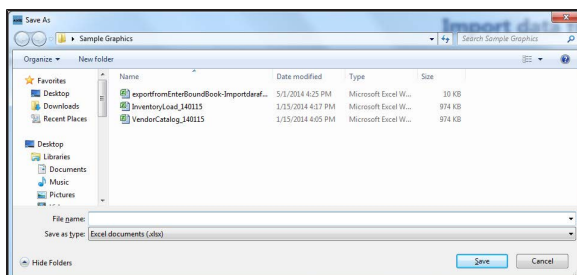
4. Click the **Continue** button to close the warning window and display the associated **Import data from Excel** screen.



2. Right-click on the list to display a **Save Template** option.



3. Click the **Save Template** option to display a **Save As** window.



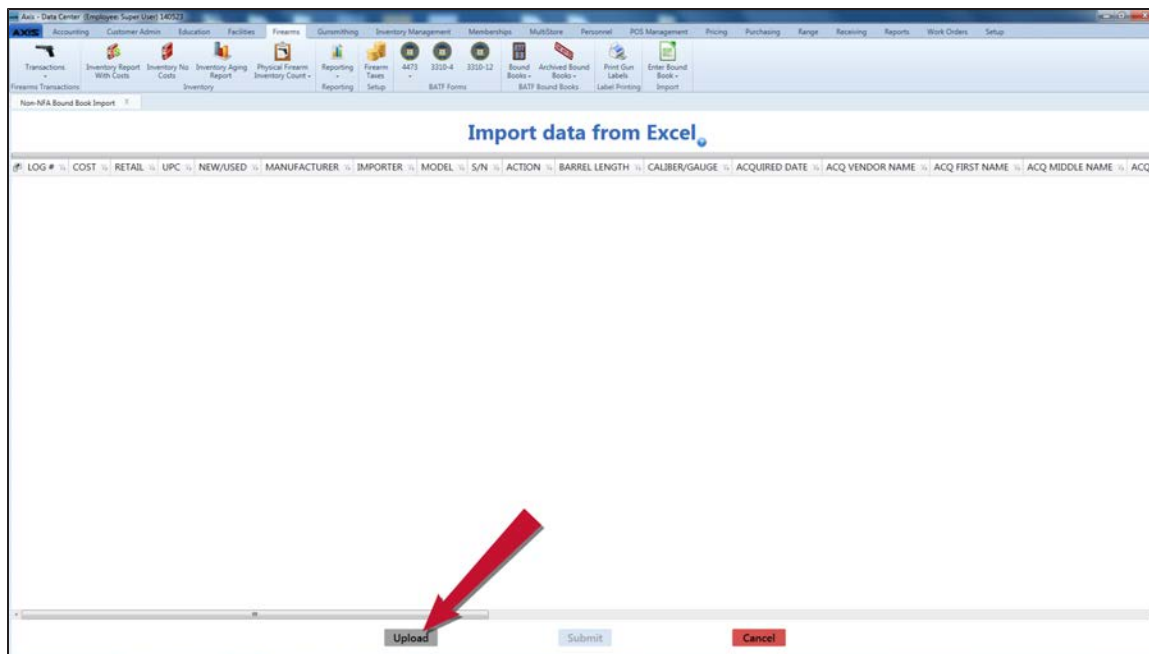
4. Complete the following procedure to save the template (Excel file):

1. Browse to the desired location.
 2. If needed, enter/edit the document name in the **File name** field.
 3. Click the **Save** button to save the document as an electronic file.
5. Open the saved Excel file template.
 6. Populate the Excel file with firearm information.

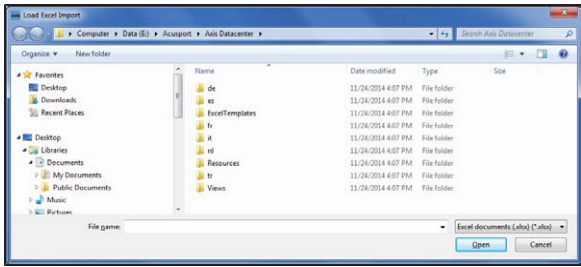
Note: The file must adhere to the validation requirements indicated below:

- No entry may have the same value for **Log #** as any other entry in this file or already in the system.
- A **UPC** must be a 12-digit number.
- The **New/Used, Manufacturer, Importer, Model, S/N** (serial number), **Action, Caliber/Gauge,** and **Acquired Date** columns are required.
- Any entry in the **Action** column must conform to the selected Bound Book: The NFA book only accepts NFA options, the Non-NFA book only accepts non-NFA options, and the Gunsmith book accepts all firearm types.
- The system requires that either the **ACQ Vendor Name** column or the **ACQ First Name** and **ACQ Last Name** columns are populated.
- Any entry in the **ID Type In** or the **ID Type Out** column must exactly match one of the types defined on the **Identification Types** screen. (Select **Setup > Identification Types** to view this screen.)
- If an entry's **Disp Date** column is populated, the system requires that either the **Disp Vendor Name** column or the **Disp First Name** and **Disp Last Name** columns are populated.

7. Save the populated Excel file.



8. Click the **Upload** button on the **Import data from Excel** screen to display the **Load Excel Import** window.

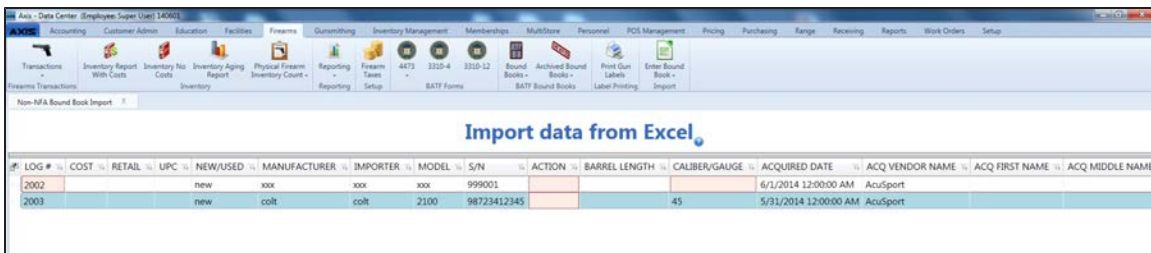


9. Browse to the desired location.
10. Double-click the saved Excel file to select it and start the import process.

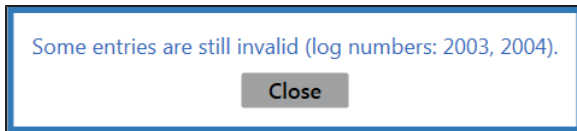
Note: This process will overwrite any information that was previously on the screen.

11. When the import is complete, the system displays the uploaded information on the **Import data from Excel** screen.

Note: If the system detects any errors with the uploaded data, it highlights the cells containing bad or missing information.

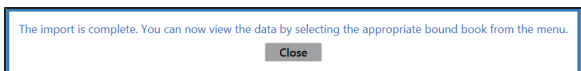


12. Locate and fix any validation errors.
13. Click the **Submit** button to place the displayed data in the associated Bound Book.
14. If the system detects validation errors, it displays an error message window.



Click the **Close** button to return to the **Import data from Excel** screen without updating the associated Bound Book and fix any outstanding validation errors as needed.

15. When the import is complete, the system displays an informational window.

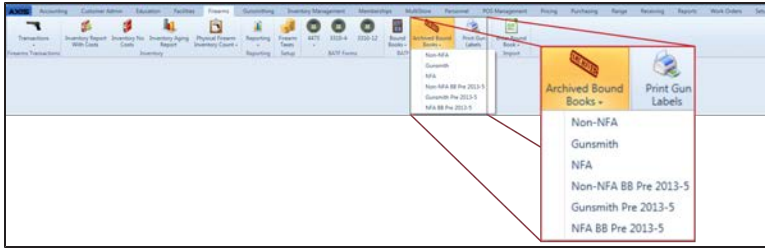


16. Click the **Close** button to close the window and screen

View a Bound Book Archive

1. Navigate to the desired Bound Book Archive screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Archived Bound Books** to display a menu of options.

3. Click the desired Bound Book Archive option to display the associated Bound Book Archive screen.

- **Non-NFA:** Contains an archive of the Non-NFA Bound Book.
- **Gunsmith:** Contains an archive of the Gunsmith Bound Book.
- **NFA:** Contains an archive of the NFA Bound Book.
- **Non-NFA BB Pre 2013-5:** Contains an archive of the Non-NFA Bound Book with audits as it existed when the system was updated for the 2013-5 transition.
- **Gunsmith BB Pre 2013-5:** Contains an archive of the Gunsmith Bound Book with audits as it existed when the system was updated for the 2013-5 transition.
- **NFA BB Pre 2013-5:** Contains an archive of the NFA Bound Book with audits as it existed when the system was updated for the 2013-5 transition.

LOG #	New/Used	MANUFACTURER	IMPORTER	MODEL	SERIAL NO	TYPE OF ACTION	BARREL LENGTH	CAL / GAUGE	ACQUIRED	ACQUISITION NAME	ACQUISITION ADDRESS	FFL IN	PRI
1	New	Test	NONE	test	500	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
2	New	Test	NONE	test	501	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
3	New	Test	NONE	test	502	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
4	New	Test	NONE	test	503	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
5	New	Test	NONE	test	504	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
6	New	Test	NONE	test	505	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
7	New	Test	NONE	test	506	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
8	New	Test	NONE	test	507	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
9	New	Test	NONE	test	508	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
10	New	Test	NONE	test	509	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
11	New	Test	NONE	test	510	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
12	New	Test	NONE	test	511	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
13	New	Test	NONE	test	512	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		
14	New	Test	NONE	test	513	Pistol	9.0000	9	2013 Jun 12	Acusport	One Hunter Place, Bellefontaine, OH 43311		

2. Complete the following procedures (if available) as needed to modify the list of records displayed on the screen:

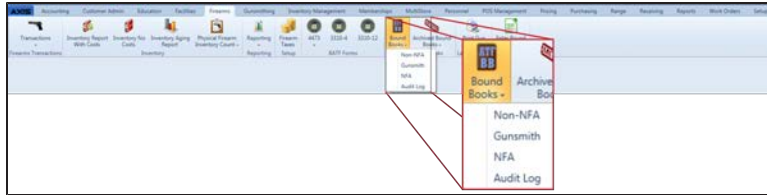
- Enter starting and ending dates in the **Date Range** fields and press the **Enter** key to display results from that time frame.
- Click the **Refresh** button to display recent updates.
- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Click the tab's **Close** button to close the screen.

View the Bound Book Audit Log Report

1. Navigate to the **Audit Log Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Bound Books > Audit Log** to display the **Audit Log Report** screen.

The screenshot displays the 'Audit Log Report' screen with a table of records. The table has columns for Table Name, Column Name, Record Number, Previous Value, New Value, Employee ID, Alteration Made, and Machine Name. The records include various transactions and inventory changes, such as 'FirearmTransaction', 'OutboundFirearm', and 'FirearmInventory'.

Table Name	Column Name	Record Number	Previous Value	New Value	Employee ID	Alteration Made	Machine Name
FirearmTransaction	Active	40012	Active	Inactive	1	2013/Jun/19 01:53 PM	TEST3-PC
OutboundFirearm	Active	20010	Active	Inactive	1	2013/Jun/19 01:53 PM	TEST3-PC
FirearmTransactionNote	Status	4003	O	I	1	2013/Jun/19 01:53 PM	TEST3-PC
FirearmInventory	Status	4106	O	I	1	2013/Jun/20 09:07 AM	TEST2-PC
FirearmInventory	Status	4028	I	O	1	2013/Jun/20 09:07 AM	TEST2-PC
OutboundFirearm	InventoryNumber	20014	4106	4028	1	2013/Jun/20 09:07 AM	TEST2-PC
FirearmTransaction	Active	40021	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransactionNote	Active	40007	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
OutboundFirearm	Active	20016	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransactionNote	Status	4106	O	I	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransaction	Active	40020	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransactionNote	Active	40006	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
OutboundFirearm	Active	20015	Active	Inactive	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransactionNote	Status	4141	O	I	1	2013/Jun/20 09:12 AM	TEST2-PC
FirearmTransaction	Active	40015	True	False	4006	2014/Mar/10 08:00 AM	TEST4
DispositionAddress	Active	30019	True	False	4006	2014/Mar/10 08:00 AM	TEST4
OutboundFirearm	Active	20013	True	False	4006	2014/Mar/10 08:00 AM	TEST4
FirearmInventory	Status	4100	O	I	4006	2014/Mar/10 08:00 AM	TEST4
FirearmInventory	TypeOfAction	5139	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4141	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4138	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4137	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4136	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4135	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4134	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4133	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4132	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4131	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4130	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2
FirearmInventory	TypeOfAction	4129	RIFLEWSIL	SILENCER	0	2014/Apr/30 08:09 AM	TEST2

2. Complete the following procedures as needed to modify the list of records displayed on the screen:

- Click the **Refresh** button to display recent updates.
- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Click the tab's **Close** button to close the screen.

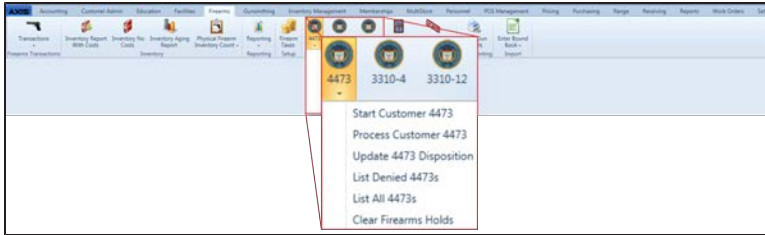
Oversee the Electronic 4473 Form Process

Complete the following procedure to manage the creation and processing of an Electronic 4473 form for a firearm transaction:

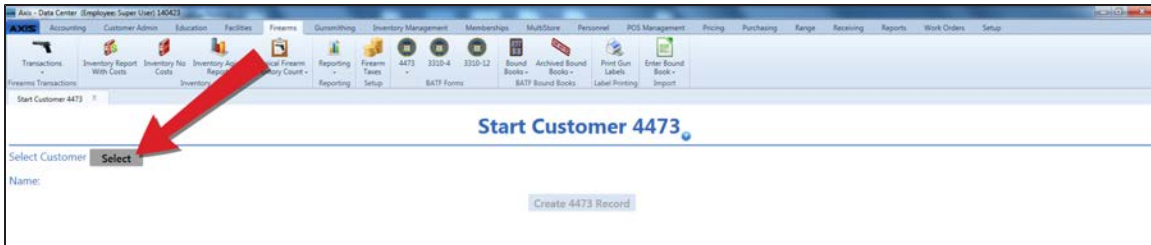
1. [Start a 4473 Form for a Customer \(see page 237\)](#).
2. Have the customer [Fill Out the Customer Portion of an Electronic 4473 Form \(see page 238\)](#).
3. When the customer returns with a valid ID, [Process a 4473 Form \(see page 239\)](#).
4. [Update a 4473 Form Disposition \(see page 244\)](#).

Start a 4473 Form for a Customer

1. Navigate to the **Start Customer 4473** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > Start Customer 4473** from the main menu to display the **Start Customer 4473** screen.

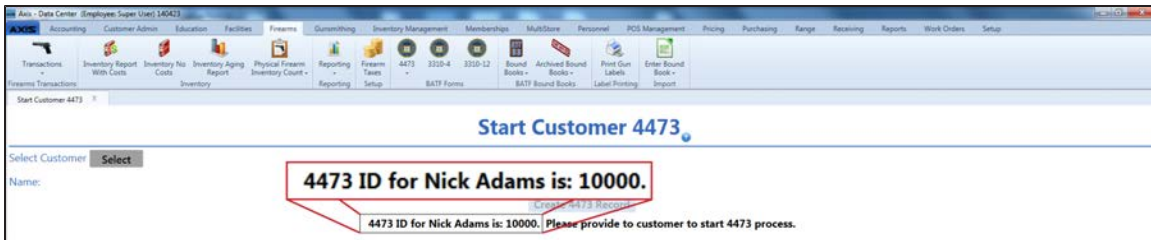


2. Click the **Select** button to display the **Customer Look-up** window.
3. [Select or Add a Firearm Customer \(see page 29\)](#).

Note: Be sure all customer information is correct. Incorrect customer information may create errors in the Bound Book.



4. Click the **Create 4473 Record** button to display the customer's **4473 ID** code.



5. Give the **4473 ID** code to the customer and have him/her [Fill Out the Customer Portion of an Electronic 4473 Form \(see page 238\)](#) on a device running the **Form 4473** application.
6. Click the tab's **Close** button to close the screen.

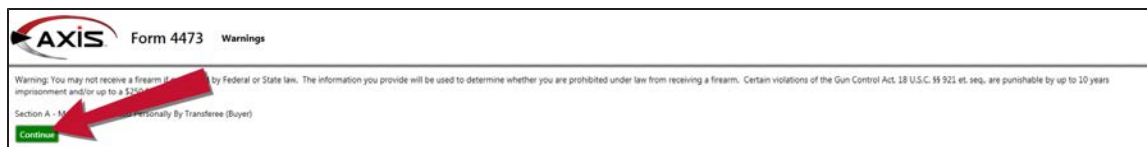
Fill Out the Customer Portion of an Electronic 4473 Form

This procedure may be completed with a tablet PC, kiosk, or computer running the **Form 4473** application.

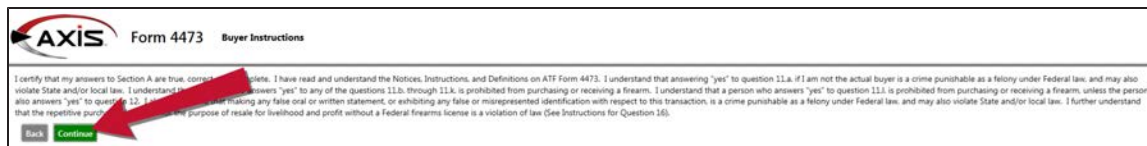
1. Ensure the **Form 4473** application is available and displaying the code entry screen.



2. If needed, click a language button (**English** or **Espanol**) to change the language used on the screen and in documents.
3. Enter the 4473 ID code provided in the **Enter 4473 Code** field.
4. Click the **Next** button to display the **Warnings** screen.



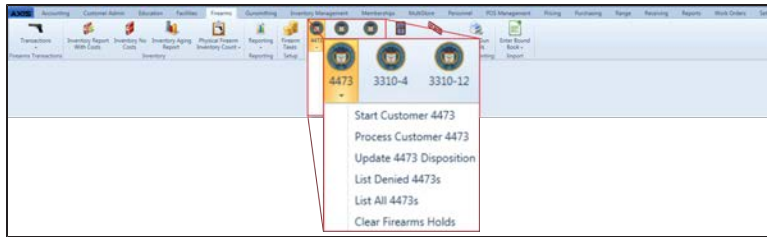
5. Click the **Continue** button to display another screen.
6. Complete these steps for every screen that follows:
 1. Read the screen carefully. Scroll if needed.
 2. Enter information in fields and answer questions as directed.
 3. Click the **Continue** button to display the next screen. (If needed, click the **Back** button to review or revise previously completed pages.)



7. Notify the salesperson when prompted or when the original code entry screen displays again.

Process a 4473 Form

1. Navigate to the **Process Customer 4473** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > Process Customer 4473** from the main menu to display the **Process Customer 4473** screen.



2. Complete the following procedures as appropriate:

Process a Customer's 4473 Form



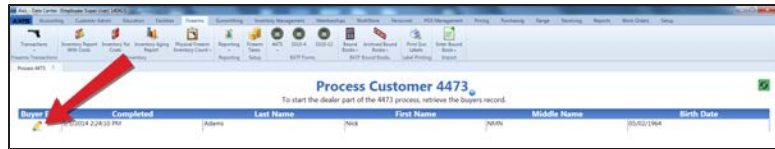
1. Double-click the customer to display the **Customer Entered Information** screen.

Note: If this screen or any of the following screens indicate the customer's 4473 form contains an error or reason for concern, click the **Back** button as needed to return to the **Process Customer 4473** screen and **Revise a Customer's 4473 Form.**

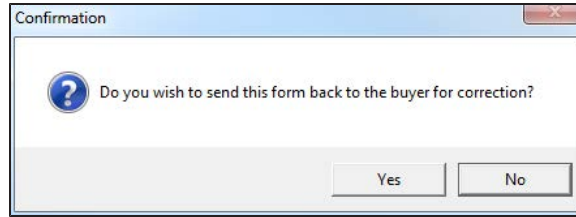


2. Continue with the procedure below.

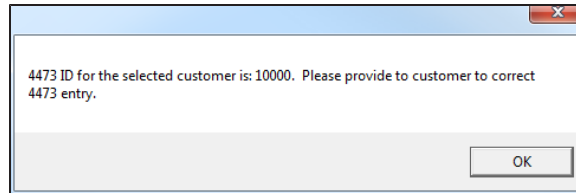
Revise a Customer's 4473 Form



1. Click the customer's **Buyer Edit** button to display the **Confirmation** window.



2. Click the **Yes** button to display a window indicating the customer's **4473 ID** code.



3. Click the **OK** button to close the window.
4. Give the **4473 ID** code to the customer and have him/her Fill Out the Customer Portion of an Electronic 4473 Form (see page 238).
5. Click the tab's **Close** button to close the screen.

3. Review the information on the **Customer Entered Information** screen and click the **Continue** button to display the completed 4473 form.

U.S. Department of Justice
Bureau of Alcohol, Tobacco, Firearms and Explosives

OMB No. 1140-0020

Firearms Transaction Record Part I - Over-the-Counter

WARNING: You may not receive a firearm if prohibited by Federal or State law. The information you provide will be used to determine whether you are prohibited under law from receiving a firearm. Certain violations of the Gun Control Act, 18 U.S.C. §§ 921 *et. seq.*, are punishable by up to 10 years imprisonment and/or up to a \$250,000 fine.

Prepare in original only. All entries must be handwritten in ink. Read the Notices, Instructions, and Definitions on this form. "PLEASE PRINT."

Transferee's Transaction Serial Number (If any)

Section A - Must Be Completed Personally By Transferee (Buyer)

1. Transferee's Full Name

Last Name ADAMS	First Name NICK	Middle Name (If no middle name, state "NMN") NMN
---------------------------	---------------------------	--

2. Current Residence Address (U.S. Postal abbreviations are acceptable. Cannot be a post office box.)

Number and Street Address 123 MAIN STREET	City SAINT CLOUD	County STEARNS	State MN	ZIP Code 56303
---	----------------------------	--------------------------	--------------------	--------------------------

3. Place of Birth

U.S. City and State SAINT CLOUD, MINNESOTA	-OR- Foreign Country N/A
--	------------------------------------

4. Height

Ft. 6	In. 0
--------------	--------------

5. Weight (Lbs)

120

Gender

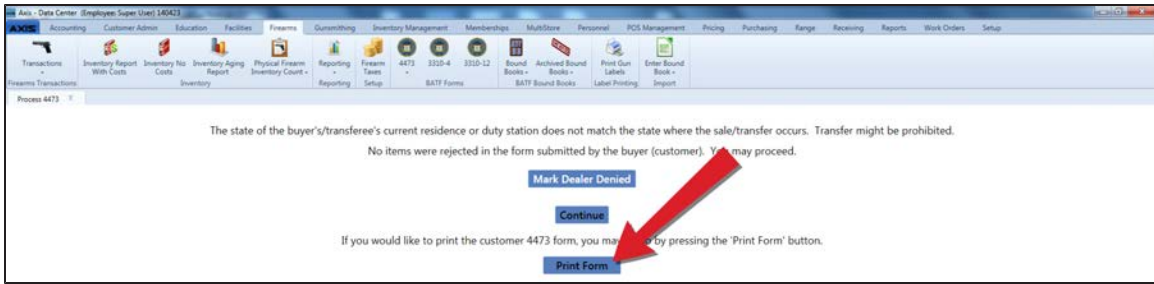
<input checked="" type="checkbox"/> Male	<input type="checkbox"/> Female
--	---------------------------------

7. Birth Date

Month 05	Day 02	Year 1964
--------------------	------------------	---------------------

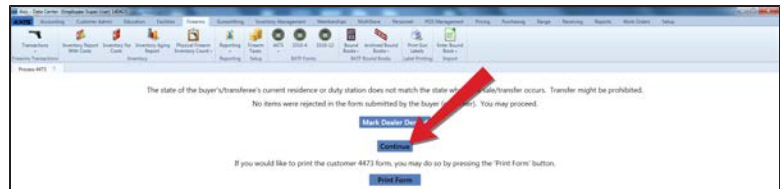
Continue

4. Review the form and click the **Continue** button near the bottom to display the 4473 decision screen.



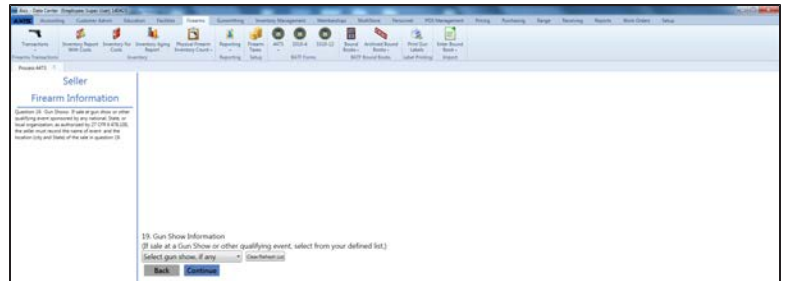
- Determine whether or not the sale should happen and complete the following procedures as appropriate:

Approve the Transaction



- Click the **Continue** button to display the **Seller Firearm Information** screen.

Note: If the **Continue** button is grayed out, the system has identified a reason to prohibit the transaction. The gun seller is responsible for verifying all answers and ultimately deciding whether or not to continue the transaction.



- Continue with the procedure below.

Deny the Transaction

Note: It may be useful at this point to [Save & Print the 4473 Form](#) to create a hardcopy of the customer's 4473 form. The form can be filed as a record of a prohibited sale or, if the sale was prohibited due to a legitimate error, used to explain to the customer where errors were made so that the process can be restarted and completed correctly.

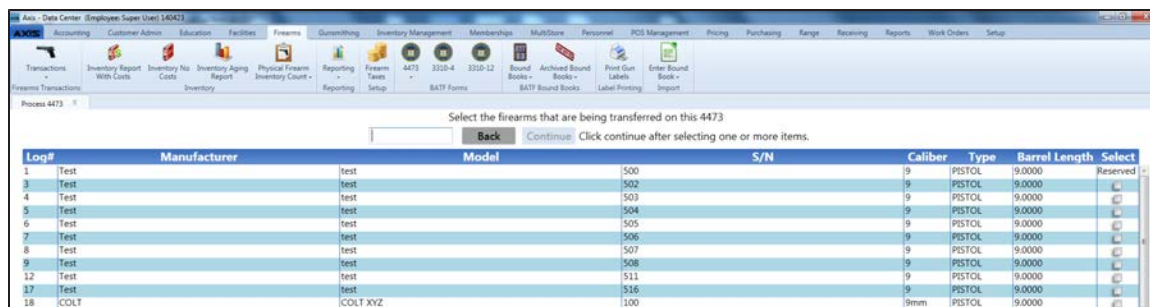


1. Click the **Mark Dealer Denied** button to display the **Update Disposition** screen.
2. Click the **Yes** button to display an informational screen.
3. Click the **OK** button.

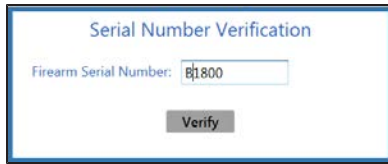
Save & Print the 4473 Form

Click the **Print Form** button to [Save and Print a Document \(see page 48\)](#) to create a hardcopy of the customer's 4473 form.

6. If the firearm was sold at a Gun Show, select the show from the drop-down field. Click the **Continue** button to display the **Seller Identification Check** screen.
7. Review the information and complete the screen. Click the **Continue** button to display the **Seller Aliens** screen.
8. Enter information as needed and complete the screen. Click the **Continue** button to display the **Seller NICS** screen.
9. Review instructions and complete the screen. Click the **Continue** button to display the firearm selection screen.

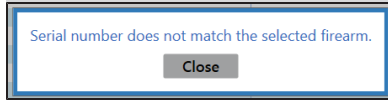


10. Complete the following procedure to identify the firearm(s) associated with this transaction.
 1. Complete one of the following procedures to select a firearm and display the **Serial Number Verification** window:
 - Scan the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Enter the firearm's log number in the **Scan Log # here** field and press the **Enter** key.
 - Locate the firearm in the list and check its **Select** checkbox.



2. Enter the firearm's serial number in the **Firearm Serial Number** field.
3. Click the **Verify** button to check the entered number against serial number in the database:

Note: If the numbers match, the firearm selection screen returns. If the numbers do not match, an informational screen appears.



Click the screen's **Close** button to return to the firearm selection screen.

4. Repeat steps as needed to reattempt a failed selection and/or select additional firearms.
11. Click the **Continue** button to display the **Seller Section D** screen.
12. Answer the question and complete the screen. Click the **Continue** button to display the **Seller FFL Information** screen.
13. Review the information and complete the screen. Click the **Continue** button to display the completed 4473 form.

Note: The **Transaction Serial Number** is located on the upper right side of the 4473. If the store does not number transactions, clear the default number from the field.

14. Review the form and click the **Continue** button to display the **Seller Certification** screen.
15. Read the screen and click the **I agree with and certify the above statement** button to display the **Save As** window.
16. [Save and Print a Document \(see page 48\)](#) to create a hardcopy of the form.

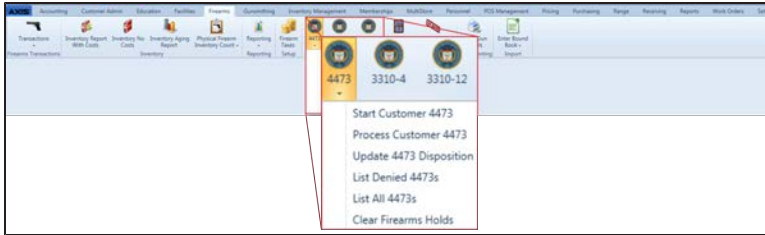
Note: Save the electronic document for future reference. Have the customer sign the printed form and save it in a secure location.

17. Click the **Close** button to close the screen.

Update a 4473 Form Disposition

1. Navigate to the **Update 4473 Disposition** screen.

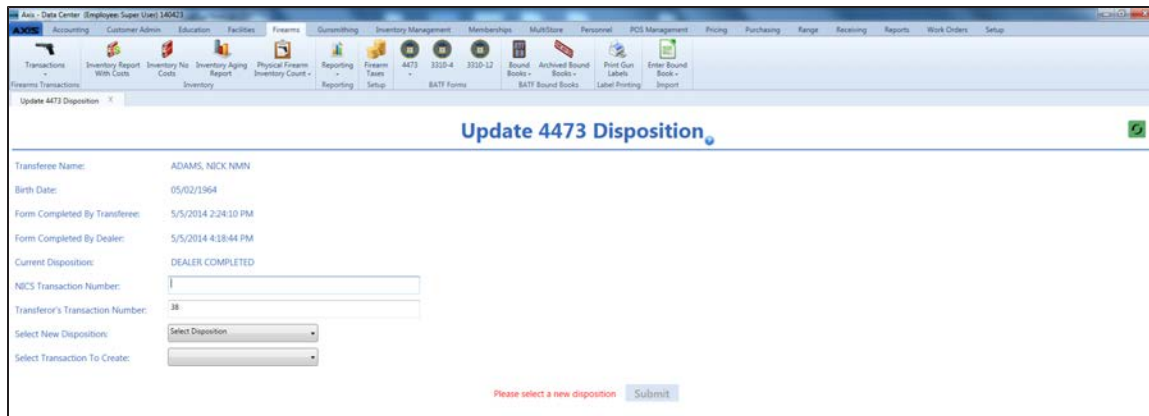
1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > Update 4473 Disposition** from the main menu to display the **Update 4473 Disposition** screen.

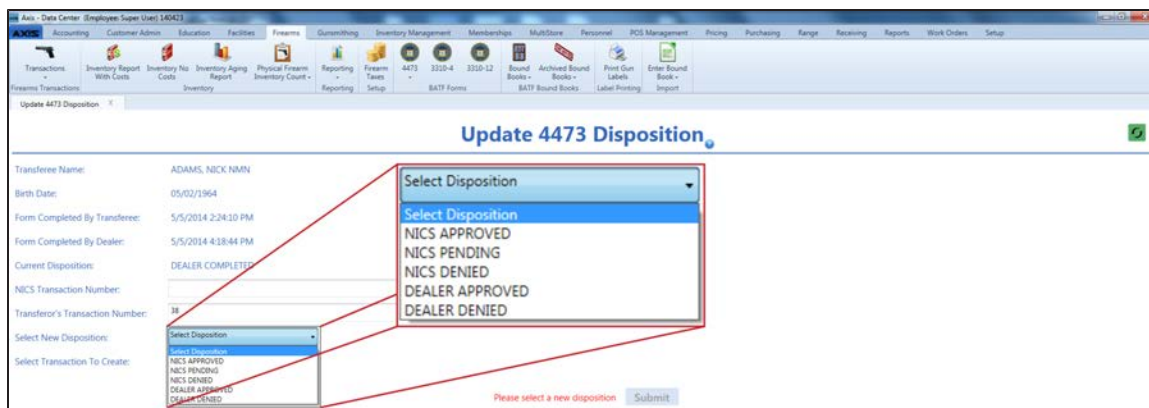


2. Double-click the customer to display the customer's 4473 information on the screen.



3. Enter the NICS transaction number in the **NICS** field.

4. If needed, modify the information in the **Transaction Serial Number** field to reflect the accepted numbering convention.



5. Determine the disposition and complete the following procedures as appropriate:

Approve the 4473 Disposition

1. Select an “Approved” disposition from the **Select New Disposition** drop-down field.
 2. Continue with the procedure below.
-

Deny the 4473 Disposition

1. Select a “Denied” disposition from the **Select New Disposition** drop-down field.
2. Click the **Submit** button to close the **Update 4473 Disposition** screen.

Note: If needed, refer to [View and Use a List of Denied 4473 Forms \(see page 247\)](#) for more information.

Delay the 4473 Disposition

1. Select a “Pending” disposition from the **Select New Disposition** drop-down field.
 2. Click the **Submit** button to close the **Update 4473 Disposition** screen.
-

6. Select the firearm transaction type from the **Select Transaction To Create** drop-down field.
7. Click the **Submit** button to display the firearm transaction screen for the corresponding procedure.
8. Verify and complete the firearm transaction screen.

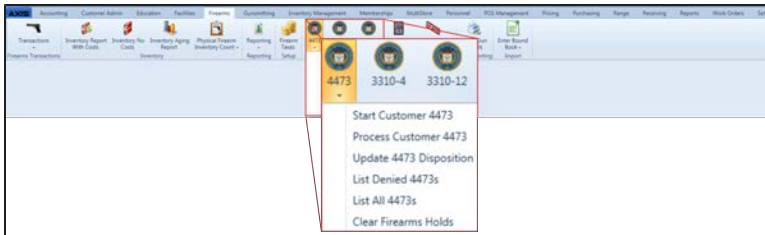
Note: Do not edit customer or firearm information on the transaction screen. Changing this information will cause errors in the Bound Book.

Note: Refer to the appropriate procedure ([Document the Return of an Incoming Consignment Firearm \(see page 219\)](#), [Document a Firearm Sale \(see page 203\)](#), [Document a Firearm Trade \(see page 207\)](#), or [Document an Outgoing Firearm Transfer \(see page 213\)](#)) to complete the transaction.

View and Use a List of All 4473 Forms

1. Navigate to the **All 4473s** screen.

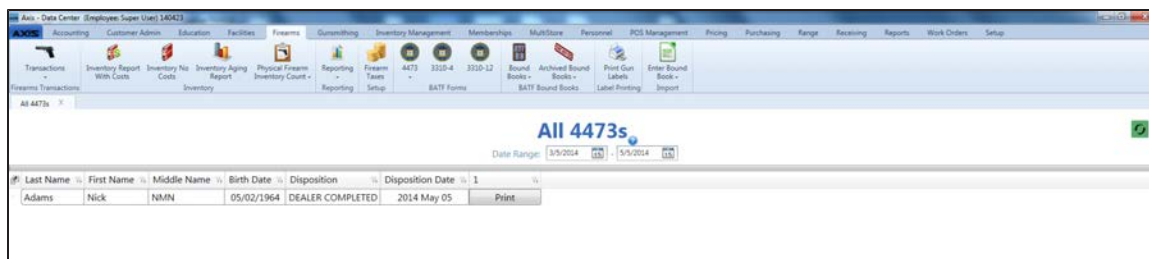
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > List All 4473s** from the main menu to display the **All 4473s** screen.

3. Enter starting and ending dates in the **Date Range** fields to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedure as appropriate:

Print a Customer's 4473 Form

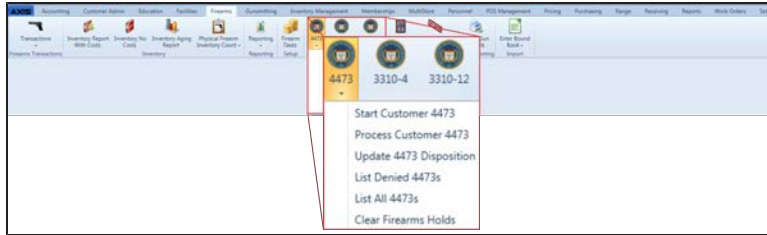
Click the customer's **Print** button.

Note: Refer to [Save and Print a Document \(see page 48\)](#) for more information.

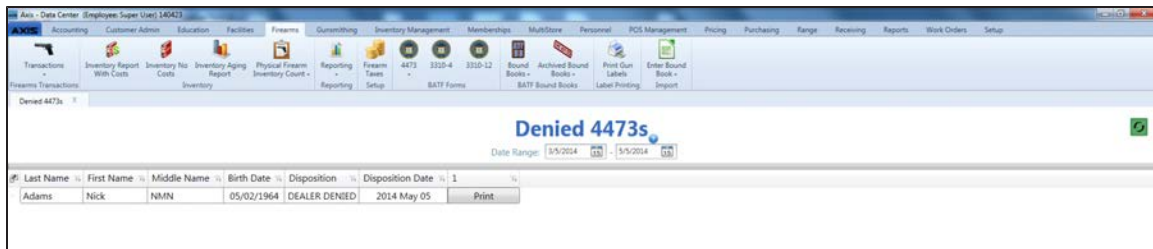
3. Click the tab's **Close** button to close the screen.

View and Use a List of Denied 4473 Forms

1. Navigate to the **Denied 4473s** screen.
 1. [Log In to the Data Center Application](#) (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > List Denied 4473s** from the main menu to display the **Denied 4473s** screen.
3. Enter starting and ending dates in the **Date Range** fields to display results from that time frame.
Note: If needed, [Sort and Filter Onscreen Data](#) (see page 40).



2. Complete the following procedure as appropriate:

Print a Customer's 4473 Form

Click the customer's **Print** button.

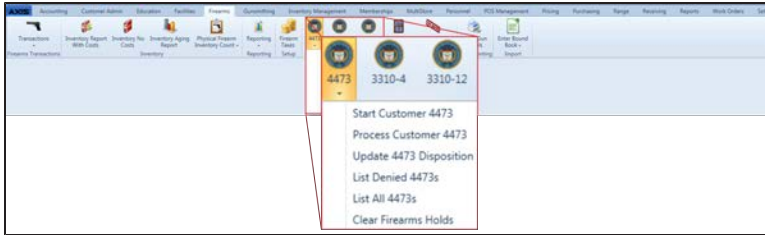
Note: Refer to [Save and Print a Document](#) (see page 48) for more information.

3. Click the tab's **Close** button to close the screen.

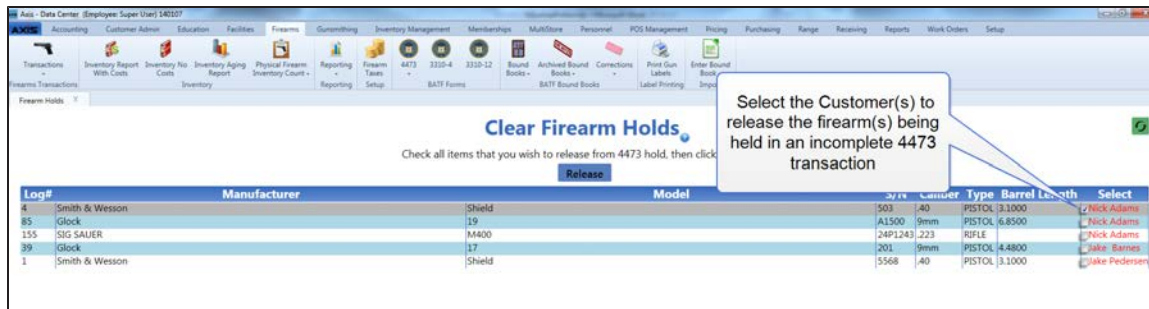
Clear a Firearm Hold

1. Navigate to the **Clear Firearms Holds** screen.

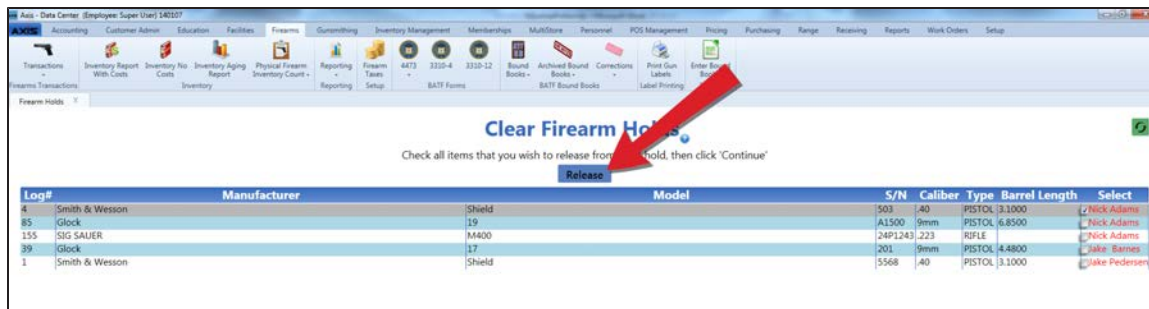
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > 4473 > Clear Firearms Holds** from the main menu to display the **Clear Firearms Holds** screen.



2. Check a firearm's **Select** checkbox to select the firearm for clearing. (Repeat this step as needed to select additional firearms for clearing.)



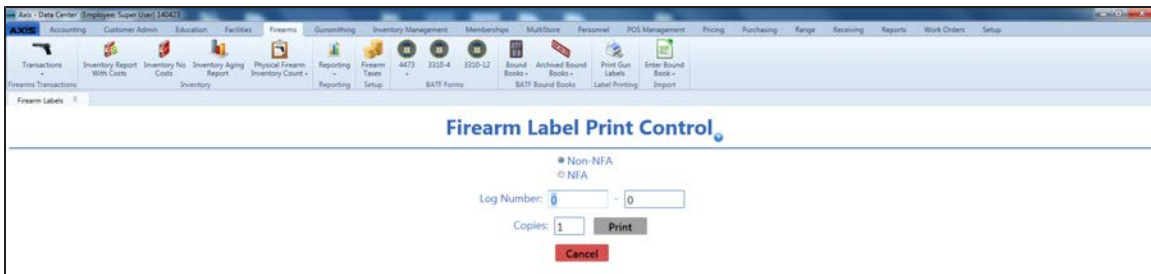
3. Click the **Release** button to clear each selected firearm from the screen and return it to inventory.
4. Click the tab's **Close** button to close the screen.

Print Firearm Labels

1. Navigate to the **Firearm Label Print Control** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Print Gun Labels** from the main menu to display the **Firearm Label Print Control** screen.



2. Click the **Non-NFA** or **NFA** button as needed to select the appropriate type of firearm.
3. Enter starting and ending log numbers in the **Log Number** fields to print labels for that range of log numbers.

Note: If desired, starting and ending transaction numbers may be entered in the fields to print labels for that range of transactions.

4. Enter the desired number of labels to print for each log number (or transaction) in the **Copies** field.
5. Click the **Print** button.
6. Click the tab's **Close** button to close the screen.

Perform a Physical Inventory Count for Firearms

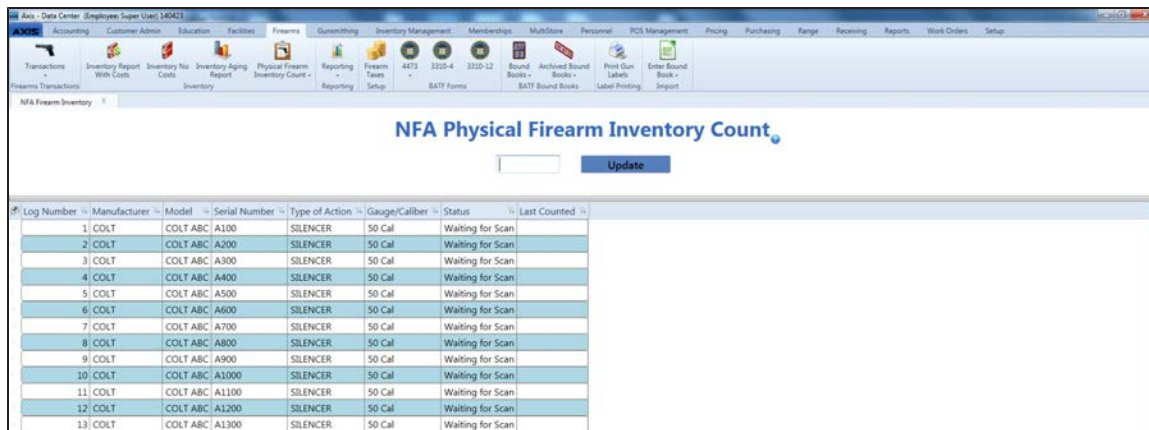
Complete the following procedure to take a physical inventory count for firearms.

Note: A physical inventory count is essential for verifying the physical presence of individual firearms in the store/warehouse. RTG recommends performing a complete physical firearm inventory count once every thirty days.

1. Navigate to the appropriate (**Gunsmithing, NFA, or Non-NFA**) **Physical Firearm Inventory Count** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Physical Firearm Inventory Count** to display a menu of options.
3. Click the desired firearm type option (**Gunsmithing, NFA, or Non-NFA**) to display the associated **Physical Firearm Inventory Count** screen.

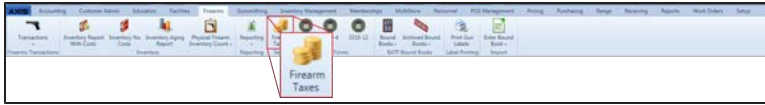


2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedure for each located firearm:
 1. Scan or enter the firearm's **Log Number** (or **INV#**) in the blank field.
 2. Press the **Enter** key to move the firearm to the bottom of the list and update the value in its **Status** cell to "Scanned."
4. If needed, review the **Status** cell for each entry in the list to determine the firearm's status. A **Status** cell can display one of the following values:
 - "Waiting for Scan" indicates the firearm is not present or has not been scanned.
 - "Scanned" indicates the firearm has been counted.
 - "Item Does Not Have Inbound Status" indicates the firearm has been disposed.
 - "Firearm Not Found" indicates the entered **Log Number** is invalid or has been voided.
5. When all firearms have entered, click the **Update** button.
6. Click the tab's **Close** button to close the screen.

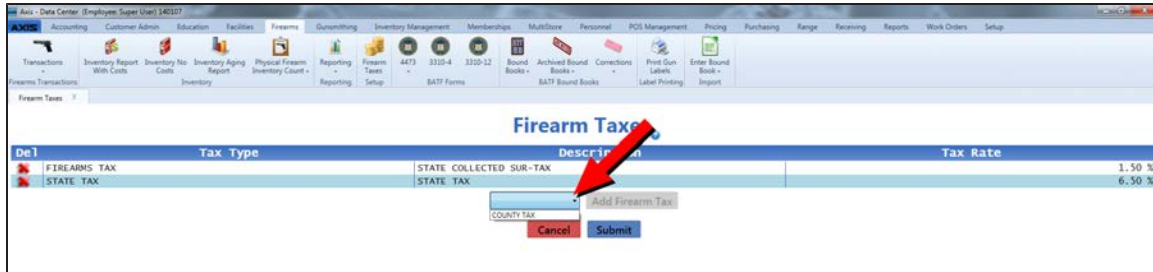
Manage a Firearm Tax

1. Navigate to the **Firearm Taxes** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

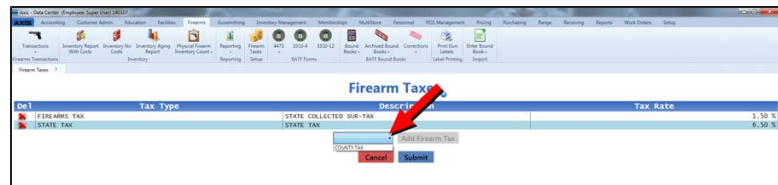


2. Select **Firearms > Firearm Taxes** from the main menu to display the **Firearm Taxes** screen.



2. Complete the following procedures as appropriate to manage firearm taxes:

Add a Firearm Tax



1. Select an available tax type from the drop-down field.

Note: If a new tax type is needed, refer to [Manage Tax Types \(see page 321\)](#) for more information.

2. Click the **Add Firearm Tax** button to display the tax on the screen.

3. Click the tab's **Close** button to close the screen.

Delete a Firearm Tax



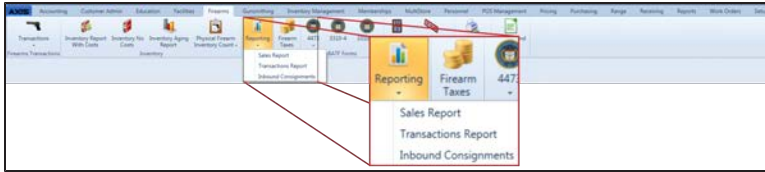
1. Click a tax's **Delete** button to remove it from the screen.

2. Click the tab's **Close** button to close the screen.

View the Firearm Sales Report

1. Navigate to the **Firearm Sales Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Reporting > Sales Report** to display the **Firearm Sales Report** screen.



2. Complete the following procedure to determine which transactions are displayed on the screen:

1. Enter starting and ending dates in the **Date Range** fields to define the time frame.
2. Click the **Submit** button to display selected transactions.

3. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

4. Complete the following procedure as appropriate to view information about a particular transaction:

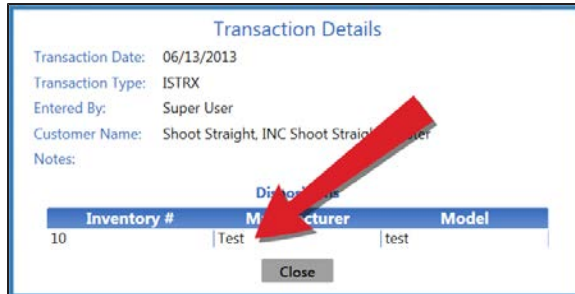
View a Transaction's Details



The screenshot shows a software window titled "Firearm Sales Report". It contains a table with columns for Date, Time, Status, Manufacturer, Model, Serial Number, Gauge/Cal, Inventory #, Cost, Price, % Gain, and Profit. A red arrow points to the "View" button located at the bottom right of the table.

Date	Time	Status	Manufacturer	Model	Serial Number	Gauge/Cal	Inventory #	Cost	Price	% Gain	Profit	
6/13/2013	8:00 PM	2	New	GLOCK	L7 68M4	FA2113	88M	2002	\$475.00	\$199.00	26.13 %	\$124.00
6/13/2013	12:20 PM	1	New	Test	Test	Test	Test	Test	\$500.00	\$500.00	0.00 %	\$0.00
6/13/2013	11:00 AM	1	New	Test	Test	Test	Test	Test	\$100.00	\$100.00	0.00 %	\$0.00
6/13/2013	11:00 AM	1	New	Test	Test	Test	Test	Test	\$100.00	\$100.00	0.00 %	\$0.00
6/13/2013	11:30 AM	1	New	Test	Test	Test	Test	Test	\$100.00	\$100.00	0.00 %	\$0.00

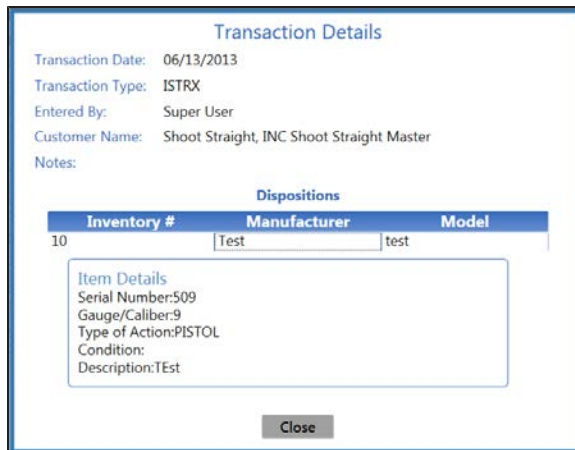
1. Click the transaction's **View** button to display its **Transaction Details** window.



The screenshot shows the "Transaction Details" window. It displays the following information: Transaction Date: 06/13/2013, Transaction Type: ISTRX, Entered By: Super User, Customer Name: Shoot Straight, INC Shoot Straight Master. Below this is a "Dispositions" table with columns for Inventory #, Manufacturer, and Model. A red arrow points to the "View" button located at the bottom right of the Dispositions table.

Inventory #	Manufacturer	Model
10	Test	test

2. Click an item to view its specific details.



The screenshot shows the "Transaction Details" window. It displays the following information: Transaction Date: 06/13/2013, Transaction Type: ISTRX, Entered By: Super User, Customer Name: Shoot Straight, INC Shoot Straight Master. Below this is a "Dispositions" table with columns for Inventory #, Manufacturer, and Model. A red arrow points to the "View" button located at the bottom right of the Dispositions table.

Inventory #	Manufacturer	Model
10	Test	test

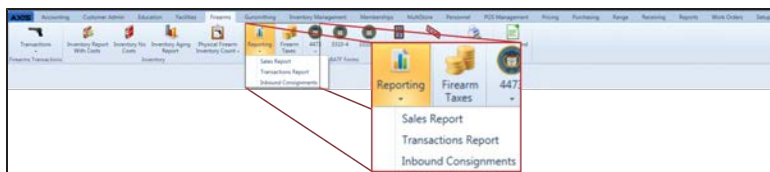
Item Details
Serial Number:509
Gauge/Caliber:9
Type of Action:PISTOL
Condition:
Description:TTest

3. Click the **Close** button to close the **Transaction Details** window.

5. Click the tab's **Close** button to close the screen.

View the Firearm Transactions Report

1. Navigate to the **Firearm Transactions Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

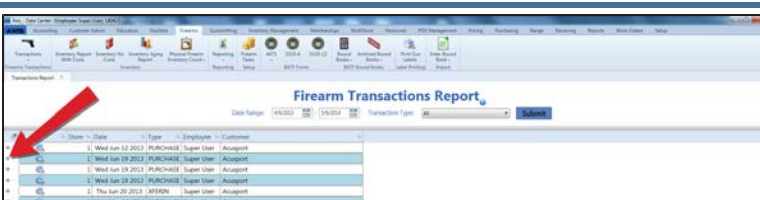


2. Select **Firearms > Reporting > Transactions Report** to display the **Firearm Transactions Report** screen.

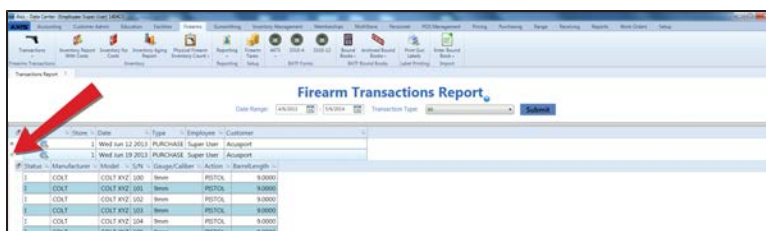


2. Complete the following procedure to determine which transactions are displayed on the screen:
 1. Enter starting and ending dates in the **Date Range** fields to define the time frame.
 2. Select a transaction type from the **Transaction Type** drop-down to restrict the types of transactions to include in the report.
 3. Click the **Submit** button to display selected transactions.
3. Complete the following procedures as needed to modify the list displayed on the screen:
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
4. Complete the following procedures as appropriate to view information about a particular transaction:

View a Transaction's Component Record

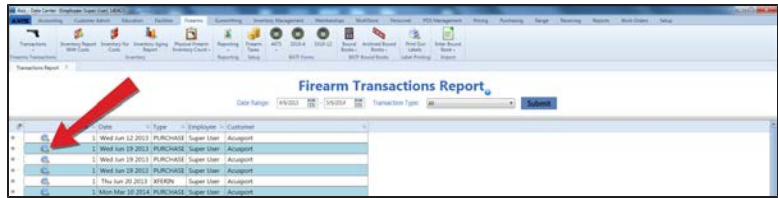


1. Click the transaction's **Expand (+)** button to display its component record.

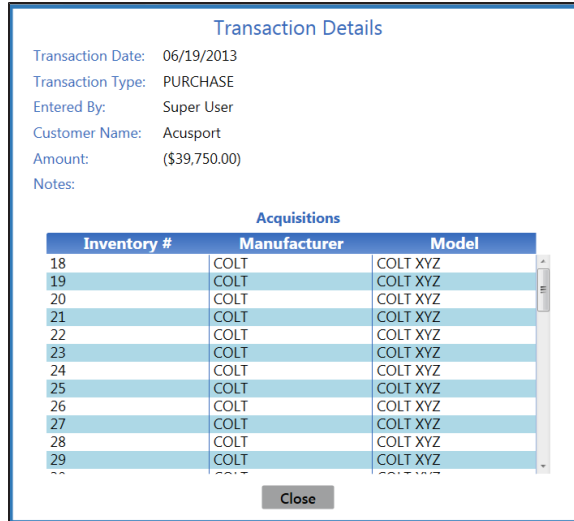


2. Click the transaction's **Contract (-)** button to close its component record.

View a Transaction's Details



1. Click the transaction's **View** button to display its **Transaction Details** window.



2. Click an item to view its specific details.
 3. Click the **Close** button to close the **Transaction Details** window.
-
5. Click the tab's **Close** button to close the screen.

View and Update the Firearm Inventory With Costs Report

1. Navigate to the **Firearm Inventory With Costs** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Inventory Report With Costs** to display the **Firearm Inventory With Costs** screen.

#	Edit	Trans	Log #	Store	Firearm UPC	MFG #	Item #	Cost	Sales Price	New/Used	Manufacturer	Importer	Model	Serial Number	Barrel Length	Gauge/Caliber	Type Of Action	Is Rental	Res
97			1	000012340000	TEST GUN c		\$850.00	\$850.00	New	ak47	ak47	ak47	999888005			SOICAL	RIFLE	<input type="checkbox"/>	
102			1	000012340000	TEST GUN c		\$850.00	\$850.00	Used	ak47	ak47	ak47	999888009			SOICAL	RIFLE	<input type="checkbox"/>	
90			1	000012340000	TEST GUN c		\$850.00	\$950.00	Used	ak47	ak47	ak47	y101			SOICAL	RIFLE	<input type="checkbox"/>	
91			1	000012340000	TEST GUN c		\$0.00	\$850.00	New	ak47	ak47	ak47	y102			SOICAL	RIFLE	<input type="checkbox"/>	
92			1	01352719124			\$0.00	\$850.00	New	COLT	NONE	COLT XYZ	D1000		9.0000	9mm	PISTOL	<input type="checkbox"/>	Dist
18			1	01352719124	1181		\$750.00	\$850.00	New	COLT	NONE	COLT XYZ	100		9.0000	9mm	PISTOL	<input type="checkbox"/>	

2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Check the **Include NFA** checkbox to display all firearm types.
 - Check the **Include Rentals** checkbox to display rental firearms in the list.
 - Click the **Refresh** button to display recent updates.
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedures as appropriate to view information about a particular transaction:

Edit a Firearm's Description

1. Click a firearm's **Edit** button to display its **Firearm Description** window.

Firearm Description

UPC: 01352719124

Manufacturer: COLT

Manufacturer #: 1181

Importer: NONE

Model: COLT XYZ

Serial Number: 100

Barrel Length: 9.0000

Gauge/Caliber: 9mm

Type of Firearm: Pistol

Description: TEST PISTOL 1

New/Used: New Condition:

Cost: \$750.00

Sales Price: \$850.00 Location:

Cancel Submit

2. [Describe a Firearm \(see page 37\)](#).
3. Click the **Submit** button to close the **Firearm Description** window.

Edit a Firearm's Sales Price

1. Click a firearm's **Sales Price** cell to select it.
2. Enter/edit the value in the cell as needed.
3. Press the **Enter** key to deselect the cell.

View a Firearm's Details

1. Click the firearm's **Trans** button to display its **Transaction Details** window.



The screenshot shows a window titled "Transaction Details". It contains the following text:

Transaction Date: 03/10/2014
Transaction Type: PURCHASE
Entered By: Jordan Guck
Customer Name: Jordan Guck
Amount: (\$850.00)
Notes:

Below the text is a table titled "Acquisitions":

Inventory #	Manufacturer	Model
90	ak47	ak47

At the bottom of the window is a "Close" button.

2. Click an item to view its specific details.
3. Click the **Close** button to close the **Transaction Details** window.

Print a Firearm Label

1. Complete any of these procedures to select the firearm(s) for which labels will be printed:
 - Check a firearm's checkbox to select it.
 - Uncheck a firearm's checkbox to deselect it.
 - Check the **Select All** button to select all firearms.
 - Uncheck the **Deselect All** button to deselect all firearms.
 2. Click the **Print** button to print labels for selected firearms.
-
4. Click the tab's **Close** button to close the screen.

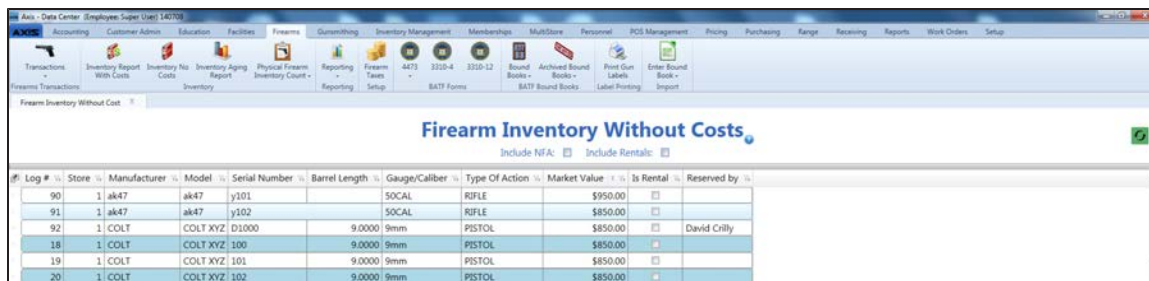
View the Firearm Inventory Without Costs Report

1. Navigate to the **Firearm Inventory Without Costs** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Inventory No Costs** to display the **Firearm Inventory Without Costs** screen.



2. Complete the following procedures as needed to modify the list displayed on the screen:

- Check the **Include NFA** checkbox to display all firearm types.
- Check the **Include Rentals** checkbox to display rental firearms in the list.
- Click the **Refresh** button to display recent updates.
- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Click the tab's **Close** button to close the screen.

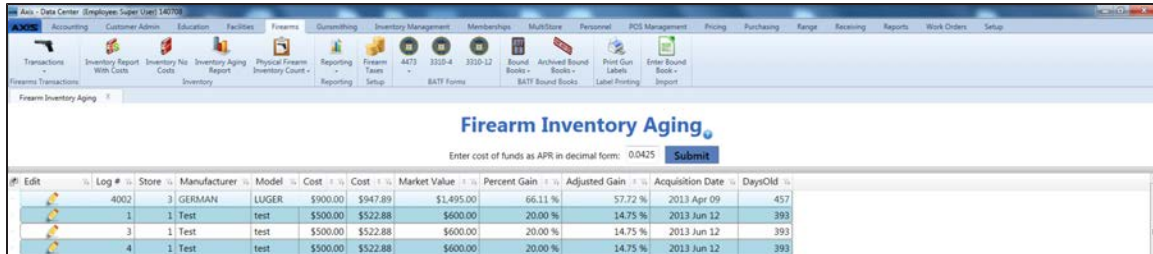
View and Update the Firearm Inventory Aging Report

1. Navigate to the **Firearm Inventory Aging** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Firearms > Inventory Aging Report** to display the **Firearm Inventory Aging** screen.



2. Complete the following procedure to determine which transactions are displayed on the screen:

1. Enter the APR value in the **Enter cost of funds as APR in decimal form** field.

Note: The APR value is the decimal form of the percentage for calculating the actual cost of holding the firearm inventory (interest rate on borrowed funds).

2. Click the **Submit** button to display the firearm inventory.

3. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

4. Complete the following procedure as appropriate to edit a firearm's description:

Edit a Firearm's Description



1. Click the firearm's **Edit** button to display the **Firearm Description** window.

The screenshot shows the 'Firearm Description' window with the following fields:

- UPC: 01352719124
- Manufacturer: COLT
- Manufacturer #: 1181
- Importer: NONE
- Model: COLT XYZ
- Serial Number: 100
- Barrel Length: 9,0000
- Gauge/Caliber: 9mm
- Type of Firearm: Pistol
- Description: TEST PISTOL 1
- New/Used: New
- Condition: [Empty]
- Cost: \$750.00
- Sales Price: \$850.00
- Location: [Empty]

Buttons: Cancel, Submit

2. Describe a Firearm (see page 37).
3. Click the **Submit** button to close the **Firearm Description** window.

5. Click the tab's **Close** button to close the screen.

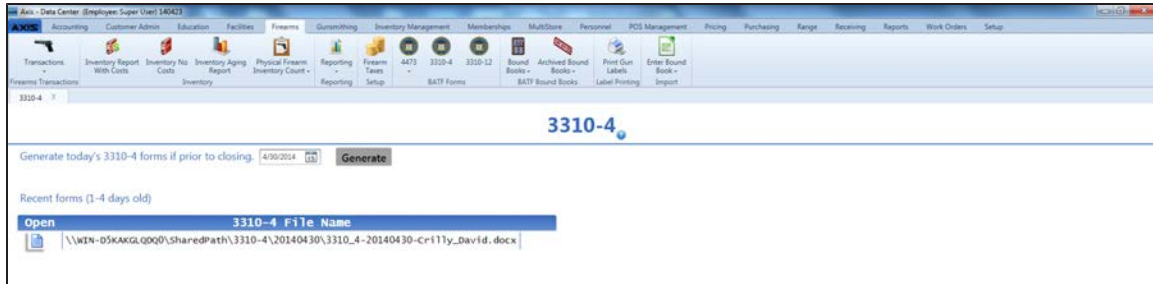
Generate, View, and Print 3310-4 Forms

1. Navigate to the **3310-4** screen.

1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.

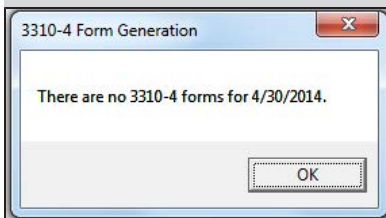


2. Select **Firearms > 3310-4** from the main menu to display the **3310-4** screen.

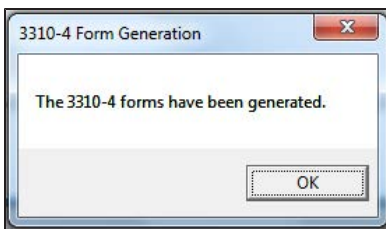


2. Enter or select the desired date in the date field. (The date field defaults to today's date.)
3. Click the **Generate** button to generate 3310-4 forms for the selected date and display a form generation confirmation window.

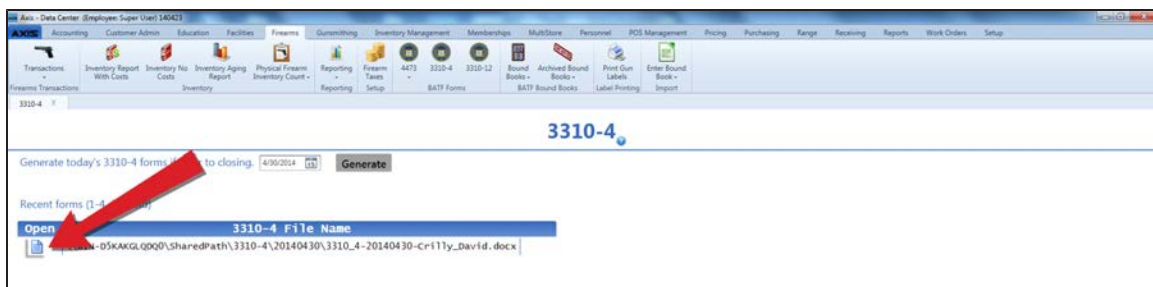
Note: If the date's firearm transactions did not generate any 3310-4 forms, the system displays the **3310-4 Form Generation** information window to indicate this:



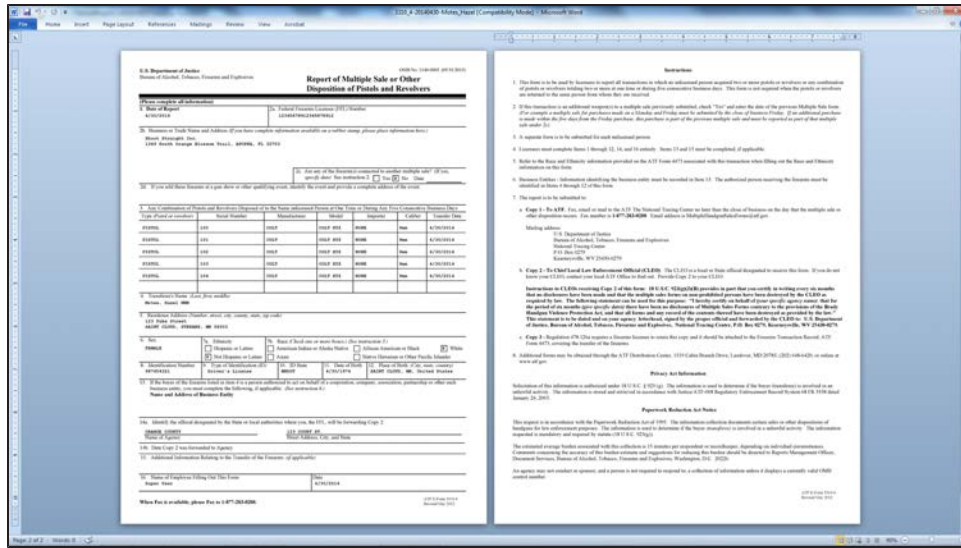
Click the **OK** button to close the window.



4. Click the **OK** button to close the confirmation window.



5. Click a form's **Open** button to view it.



6. Select **File > Print** from the menu bar to display print controls.
7. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
8. Click the **Print** button to print the document.
9. Select **File > Close** from the menu bar to close the document.
10. Click the tab's **Close** button to close the screen.

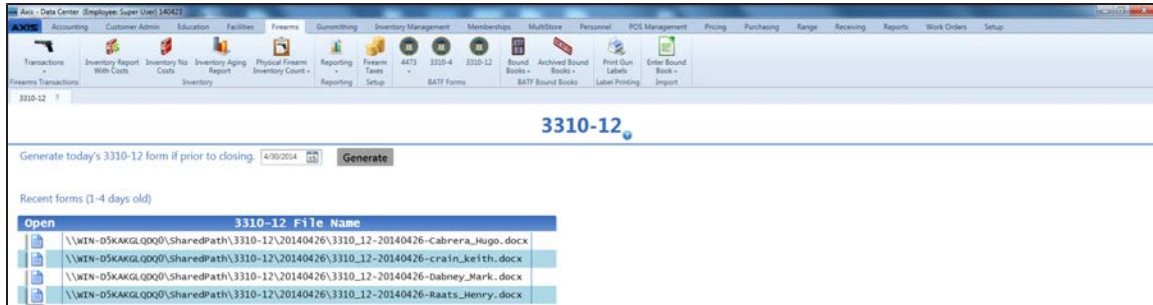
Generate, View, and Print 3310-12 Forms

1. Navigate to the **3310-12** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

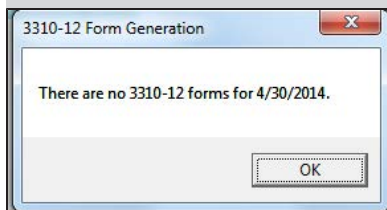


2. Select **Firearms > 3310-12** from the main menu to display the **3310-12** screen.

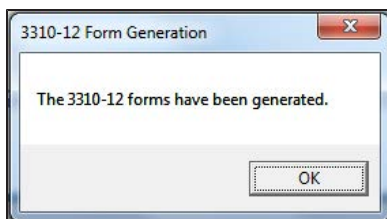


2. Enter or select the desired date in the date field. (The date field defaults to today's date.)
3. Click the **Generate** button to generate 3310-12 forms for the selected date and display a form generation confirmation window.

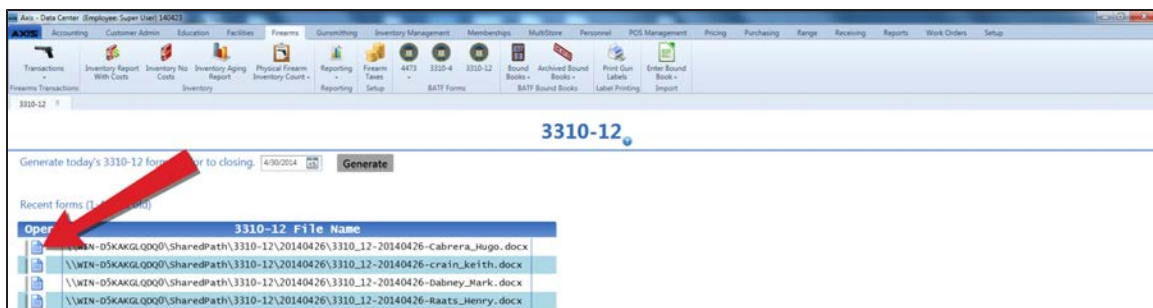
Note: If the date's firearm transactions did not generate any 3310-12 forms, the system displays the **3310-12 Form Generation** information window to indicate this:



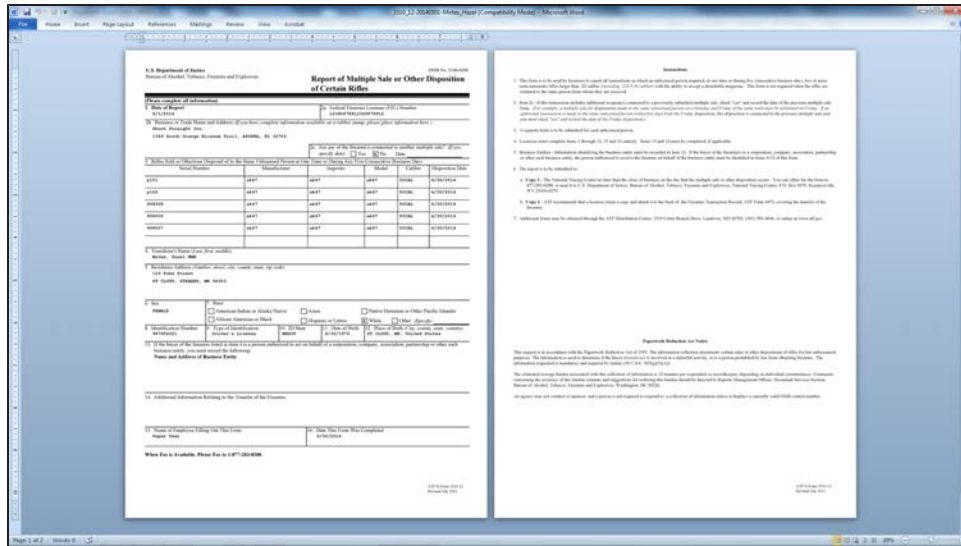
Click the **OK** button to close the window.



4. Click the **OK** button to close the confirmation window.



5. Click a form's **Open** button to view it.



6. Select **File > Print** from the menu bar to display print controls.
7. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
8. Click the **Print** button to print the document.
9. Select **File > Close** from the menu bar to close the document.
10. Click the tab's **Close** button to close the screen.

Range Management

This section contains procedures to set up, maintain, and review range, lane, and waiver information, range products and rentals, and an assortment of useful statistical reports on range usage.

Range Information

Range Information includes the range's name, addresses, phone number, days and hours of operation, number of lanes, session length, and reservation limits.

- [Manage Range Information \(see page 267\)](#)

Range Lane Information

Range Lane Information includes the lane's name, availability, reservation status, and last cleaning date.

- [Manage Range Lanes \(see page 269\)](#)

Range Products

Range Products are blocks of range time sold to customers wishing to access and use the range. Like a standard product, a range product has a UPC and can be selected through the **Product Search** functions in the **Register** application.

- [Manage Range Use Products \(see page 271\)](#)

Range Rentals

Range Rentals are firearms available for rent for use during a range session.

- [Manage the Rental Firearm List \(see page 274\)](#)
- [View and Update the Current Rentals List \(see page 275\)](#)

Waiver Information

Waiver Information includes the standard text on the electronic range waiver and the number of days for which it is valid.

- [Set Up and Edit the Range Waiver \(see page 276\)](#)

Range Shooters Report

The Range Shooters Report displays the customers who have used the range and the number of visits for each.

- [View the Range Shooters Report \(see page 277\)](#)

Reservation Statistics Report

The Reservation Statistics Report displays every range reservation and the details (customer, date, day, time, and lane) for each.

- [View the Reservation Statistics Report \(see page 278\)](#)

Lane Use Statistics Report

The Lane Statistics Report displays every lane use session and the details (date, day, lane, type, number of shooters, and times) for each.

- [View the Lane Use Statistics Report \(see page 279\)](#)

Rental Firearm Statistics Report

The Rental Firearm Statistics Report displays every rental firearm and general information (log number, manufacturer, model, serial number, gauge/caliber, dates of first and last use, and number of rounds fired) for each. Clicking a firearm displays a record showing detailed information (renter name, date, and number of rounds fired) for each time the firearm was rented.

- [View the Rental Firearm Statistics Report \(see page 280\)](#)

Manage Range Information

Complete the following procedure to establish or update the range's name, addresses, phone number, days and hours of operation, number of lanes, session length, and reservation limits.

1. Navigate to the **Define/Edit Range** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



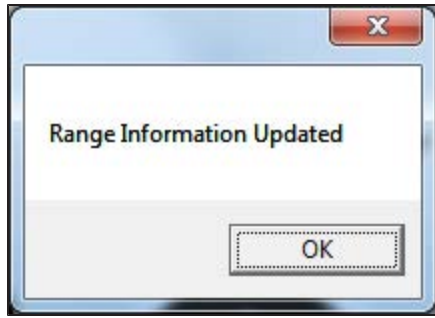
2. Select **Range > Range Setup** from the main menu to display the **Define/Edit Range** screen.



2. Enter/edit Range information on the screen.

Range Name	Enter the name of the range.
Address	Enter the range's street address.
Phone Number	Enter the range's phone number.
City	Enter the range's city.
State	Select the range's state from the drop-down.
Zip Code	Enter the range's ZIP code.
Range Closed	Check a weekday's checkbox if the range is normally closed on that day of the week.
Open	Enter the range opening time (in 24 hour/military time) for each day the range is open during a normal business week.
Close	Enter the range closing time (in 24 hour/military time) for each day the range is open during a normal business week.
Number of Lanes	Enter the range's total number of lanes.
Enter Lane Numbers That Are Handicap Accessible	Enter the individual lane numbers of lanes (separated by commas) that numbers that are handicap accessible are for the AXIS Nexus for online range reservations.
Session Length in Minutes	Enter the duration (in minutes) of a standard range session.
Number of days reservations can be made in advance	Enter the maximum number of days before a range session that a reservation for it may be made.

3. Click the **Submit** button to display a confirmation window.



4. Click the **OK** button to close the confirmation window and the **Define/Edit Range** screen.

Manage Range Lanes

Complete the following procedure to establish or update a lane's name, availability, reservation status, and last cleaning date.

1. Navigate to the **Range Lanes** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Range Lanes** from the main menu to display the **Range Lanes** screen.
3. Complete the following procedures as needed to modify the list displayed on the screen:
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).



Lane #	Name	Open	Reservable	Last Cleaned
1		<input type="checkbox"/>	<input type="checkbox"/>	March 10, 2014
2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
4		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
5		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
6		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
7		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
9		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
10		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
11		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014
12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	March 10, 2014

2. Complete the following procedures as needed to modify lane information:

Edit a Lane Name

1. Double-click a lane's **Name** field to select it.



2. Enter a name (up to 3 characters) in the field.
3. Press the **Enter** key to save the name.

Activate (/Deactivate) a Lane For Use

1. Locate the lane to be activated (or deactivated) for use.



2. Check the lane's **Open** checkbox to mark it available for use. (Uncheck the checkbox to mark the lane unavailable.)

Activate (/Deactivate) a Lane For Reservations

1. Locate the lane to be activated (or deactivated) for reservations.



Lane #	Name	Open Reservable	Last cleaned
1		<input type="checkbox"/>	March 19, 2014
2		<input type="checkbox"/>	March 19, 2014
3		<input type="checkbox"/>	March 19, 2014
4		<input type="checkbox"/>	March 19, 2014
5		<input type="checkbox"/>	March 19, 2014
6		<input type="checkbox"/>	March 19, 2014
7		<input type="checkbox"/>	March 19, 2014
8		<input type="checkbox"/>	March 19, 2014
9		<input type="checkbox"/>	March 19, 2014
10		<input type="checkbox"/>	March 19, 2014
11		<input type="checkbox"/>	March 19, 2014
12		<input type="checkbox"/>	March 19, 2014

2. Check the lane's **Reservable** checkbox to mark it available to be reserved. (Uncheck the checkbox to mark the lane unreservable.)

Update a Lane's Cleaning Record

1. Locate the lane cleaning record to be updated.



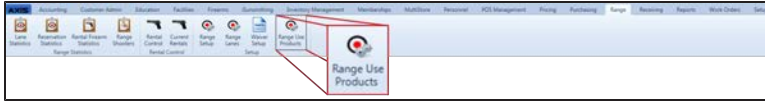
Lane #	Name	Open Reservable	Last cleaned
1		<input type="checkbox"/>	March 19, 2014
2		<input type="checkbox"/>	March 19, 2014
3		<input type="checkbox"/>	March 19, 2014
4		<input type="checkbox"/>	March 19, 2014
5		<input type="checkbox"/>	March 19, 2014
6		<input type="checkbox"/>	March 19, 2014
7		<input type="checkbox"/>	March 19, 2014
8		<input type="checkbox"/>	March 19, 2014
9		<input type="checkbox"/>	March 19, 2014
10		<input type="checkbox"/>	March 19, 2014
11		<input type="checkbox"/>	March 19, 2014
12		<input type="checkbox"/>	March 19, 2014

2. Double-click a lane's **Last Cleaned** field to select it.
 3. Enter the cleaning date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Last Cleaned** field.
 4. Press the **Tab** key to save the date.
3. Click the tab's **Close** button to close the screen.

Manage Range Use Products

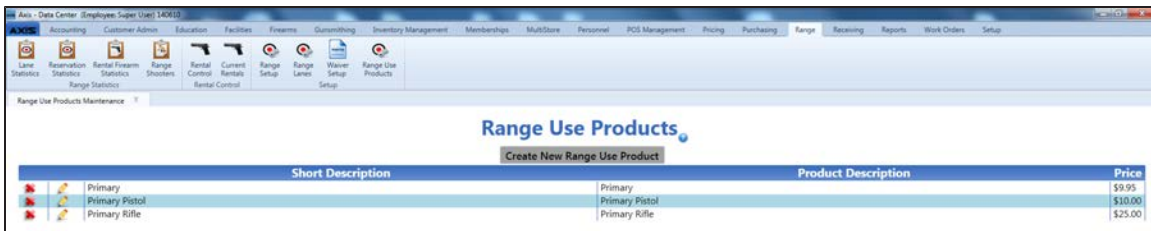
Complete the following procedure to establish or update a range product (block of range time sold to a customer wishing to access and use the range).

1. Navigate to the **Range Use Products** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Range Use Products** from the main menu to display the **Range Use Products** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

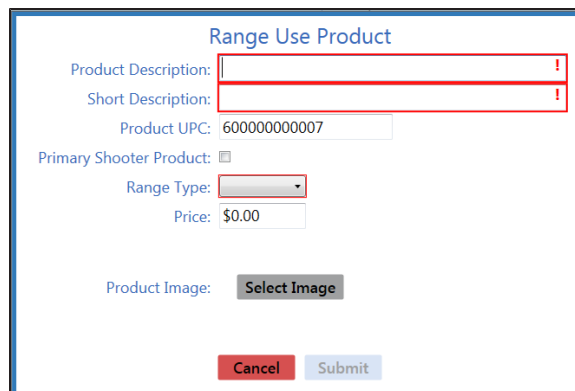


2. Complete the following procedures as needed to manage lane use products:

Create a Range Use Product



1. Click the **Create New Range Use Product** button to display the **Range Use Product** window.

A screenshot of the Range Use Product window. It contains several input fields: Product Description, Short Description, Product UPC (600000000007), Primary Shooter Product (checkbox), Range Type (dropdown menu), Price (\$0.00), and Product Image (Select Image button). There are 'Cancel' and 'Submit' buttons at the bottom.

Range Use Product

Product Description:

Short Description:

Product UPC: 600000000007

Primary Shooter Product:

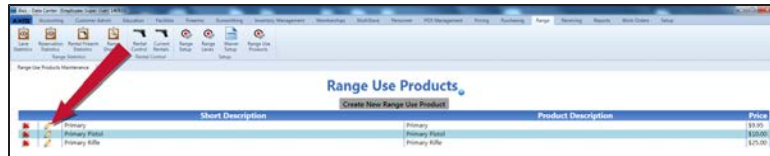
Range Type:

Price: \$0.00

Product Image:

2. Continue with the procedure below.

Edit a Range Use Product



1. Click a product's **Edit** button to display its **Range Use Product** window.

Range Use Product

Product Description: Primary

Short Description: Primary

Product UPC: 600000000000

Primary Shooter Product:

Range Type: Pistol

Price: \$9.95

Product Image:

2. Continue with the procedure below.

Delete a Range Use Product



1. Click a product's **Delete** button to display a deletion confirmation window.

Are you sure you want to delete this range use product?

2. Click the **Yes** button to remove the product from the **Range Use Product** window.

3. Enter/edit the product description in the **Product Description** field.
4. Enter/edit the concise product description in the **Short Description** field.
5. If needed, modify the autofilled value in the **Product UPC** field.
6. If this is a primary shooter product, check the **Primary Shooter Product** checkbox.

Note: A primary shooter product (checked box) can be assigned to a range lane by itself. A secondary shooter product (unchecked box) can be assigned only if a primary shooter is already on the lane.

7. Select a range type from the **Range Type** drop-down field.

Note: A customer will be allowed to rent only the selected type of firearm when purchasing this product.

8. Enter/edit the price to charge for this product in the **Price** field.
9. Do not click the **Select Image** button as it has been deactivated in this window.

Note: To add a **Product Image**, complete the remainder of this procedure to create this range use product. Then complete the procedure to select the range use product and add a product image.

10. Click the **Submit** button to display the new/modified product on the **Range Use Products** screen.
11. Click the tab's **Close** button to close the screen.

Manage the Rental Firearm List

Complete the following procedure to establish or update the list of firearms available for rent for use during a range session.

1. Navigate to the **Rental Control** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.



2. Select **Range > Rental Control** from the main menu to display the **Rental Control** screen.

Note: If needed, Sort and Filter Onscreen Data (see page 40).



Log Number	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Rental	Rental Cost
1	Test	test	500	9.0000	9	<input type="checkbox"/>	
1	COLT	COLT ABC	A100	10.0000	50 Cal	<input checked="" type="checkbox"/>	\$15.00
2	COLT	COLT ABC	A200	10.0000	50 Cal	<input type="checkbox"/>	
3	COLT	COLT ABC	A300	10.0000	50 Cal	<input type="checkbox"/>	
3	Test	test	502	9.0000	9	<input checked="" type="checkbox"/>	\$10.00
4	Test	test	503	9.0000	9	<input type="checkbox"/>	
4	COLT	COLT ABC	A400	10.0000	50 Cal	<input type="checkbox"/>	

2. Complete the following procedures as needed to manage the rental firearm list:

Add a Firearm to the Rental Firearm List



Log Number	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Rental	Rental Cost
1	Test	test	500	9.0000	9	<input type="checkbox"/>	
1	COLT	COLT ABC	A100	10.0000	50 Cal	<input checked="" type="checkbox"/>	\$15.00
2	COLT	COLT ABC	A200	10.0000	50 Cal	<input type="checkbox"/>	
3	COLT	COLT ABC	A300	10.0000	50 Cal	<input type="checkbox"/>	
3	Test	test	502	9.0000	9	<input checked="" type="checkbox"/>	\$10.00
4	Test	test	503	9.0000	9	<input type="checkbox"/>	
4	COLT	COLT ABC	A400	10.0000	50 Cal	<input type="checkbox"/>	

1. Check a firearm's **Rental** checkbox to add it to the list of rental firearms.



Log Number	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Rental	Rental Cost
1	Test	test	500	9.0000	9	<input type="checkbox"/>	
1	COLT	COLT ABC	A100	10.0000	50 Cal	<input checked="" type="checkbox"/>	\$15.00
2	COLT	COLT ABC	A200	10.0000	50 Cal	<input type="checkbox"/>	
3	COLT	COLT ABC	A300	10.0000	50 Cal	<input type="checkbox"/>	
3	Test	test	502	9.0000	9	<input checked="" type="checkbox"/>	\$10.00
4	Test	test	503	9.0000	9	<input type="checkbox"/>	
4	COLT	COLT ABC	A400	10.0000	50 Cal	<input type="checkbox"/>	

2. Enter the price to rent the firearm in the firearm's **Rental Cost** field.
3. Click the tab's **Close** button to close the screen.

Remove a Firearm from the Rental Firearm List



Log Number	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	Rental	Rental Cost
1	Test	test	500	9.0000	9	<input type="checkbox"/>	
1	COLT	COLT ABC	A100	10.0000	50 Cal	<input checked="" type="checkbox"/>	\$15.00
2	COLT	COLT ABC	A200	10.0000	50 Cal	<input type="checkbox"/>	
3	COLT	COLT ABC	A300	10.0000	50 Cal	<input type="checkbox"/>	
3	Test	test	502	9.0000	9	<input checked="" type="checkbox"/>	\$10.00
4	Test	test	503	9.0000	9	<input type="checkbox"/>	
4	COLT	COLT ABC	A400	10.0000	50 Cal	<input type="checkbox"/>	

1. Uncheck a firearm's **Rental** checkbox to remove it from the list of rental firearms.
2. Click the tab's **Close** button to close the screen.

View and Update the Current Rentals List

Complete the following procedure to review or update the list of firearms currently rented to range users.

1. Navigate to the **Current Rentals** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Current Rentals** from the main menu to display the **Current Rentals** screen.
Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedure as needed to remove a rental record from the list:

Remove a Record from the Current Rentals List



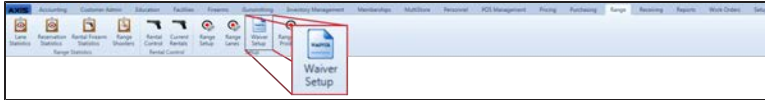
1. Click a rental record's **Clear** button to gray out the button.
 2. Click the **Refresh** button to remove the rental record from the screen.
3. Click the tab's **Close** button to close the screen.

Set Up and Edit the Range Waiver

Complete the following procedure to establish or update the standard text on the electronic range waiver and the number of days for which it is valid.

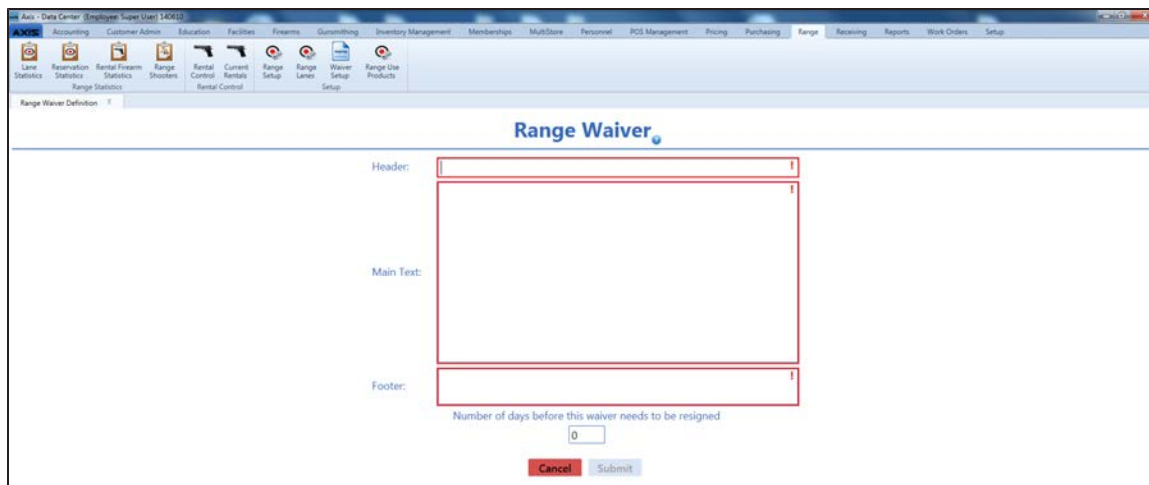
1. Navigate to the **Range Waiver** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Waiver Setup** from the main menu to display the **Range Waiver** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Enter/edit text in the **Header**, **Main Text**, and **Footer** fields.

Note: Variable commands <<name>> and <<date>> may be used in the text fields. When the range waiver displays, it will replace <<name>> with the customer's name and <<date>> with the actual date.

3. Enter/edit the value in the **Number of days before this waiver needs to be resigned** field. (If a waiver is only good for one day, set the value to zero (0) days.)
4. Click the **Submit** button to display an update confirmation window.
5. Click the **OK** button to close the confirmation window.

View the Range Shooters Report

Complete the following procedure to view a report showing customers who have used the range and the number of visits for each.

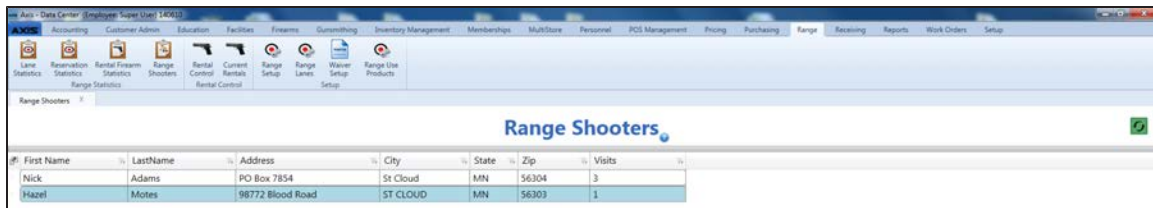
1. Navigate to the **Range Shooters** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Range Shooters** from the main menu to display the **Range Shooters** screen.

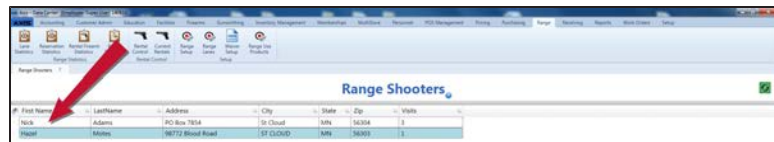
Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



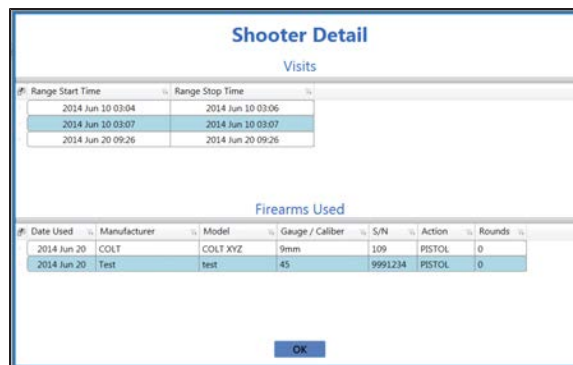
First Name	LastName	Address	City	State	Zip	Visits
Nick	Adams	PO Box 7854	St Cloud	MN	56304	3
Hazel	Motes	98772 Blood Road	ST CLOUD	MN	56303	1

2. Complete the following procedure as needed to view a shooter's detail record:

View a Range Shooter's Detail Record



1. Click a shooter's name to display his/her **Shooter Detail** window.



Range Start Time	Range Stop Time
2014 Jun 10 03:04	2014 Jun 10 03:06
2014 Jun 10 03:07	2014 Jun 10 03:07
2014 Jun 20 09:26	2014 Jun 20 09:26

Date Used	Manufacturer	Model	Gauge / Caliber	S/N	Action	Rounds
2014 Jun 20	COLT	COLT XYZ	9mm	109	PISTOL	0
2014 Jun 20	Test	test	45	9991234	PISTOL	0

OK

2. Click the **OK** button to close the **Shooter Detail** window.

3. Click the tab's **Close** button to close the screen.

View the Reservation Statistics Report

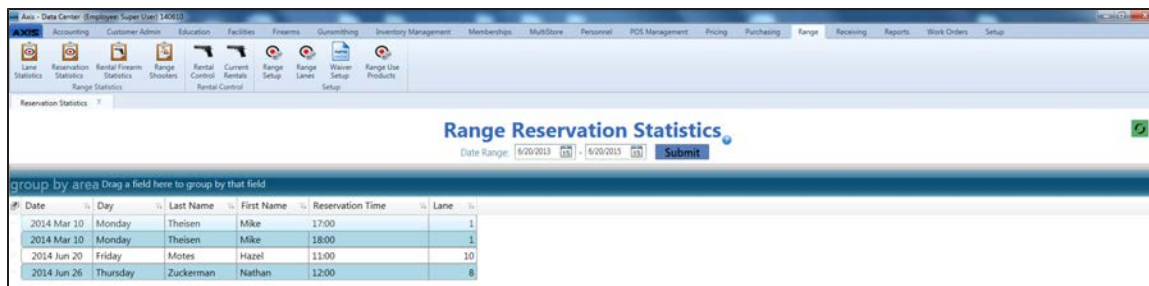
Complete the following procedure to view a report showing range reservations and the details (customer, date, day, time, and lane) for each.

1. Navigate to the **Range Reservations Statistics** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Reservation Statistics** from the main menu to display the **Range Reservations Statistics** screen.
3. Enter starting and ending dates in the **Date Range** fields and press the **Submit** key to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the tab's **Close** button to close the screen.

View the Lane Use Statistics Report

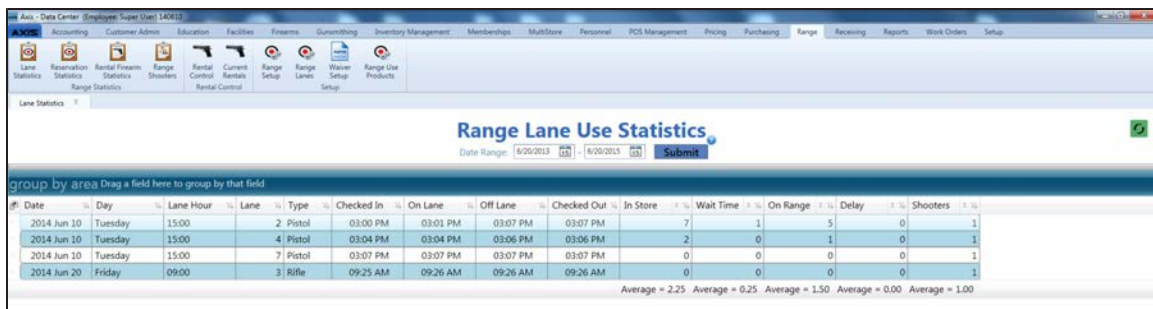
Complete the following procedure to view a report showing select lane use sessions and the details (date, day, lane, type, number of shooters, and times) for each.

1. Navigate to the **Range Lane Use Statistics** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Lane Statistics** from the main menu to display the **Range Lane Use Statistics** screen.
3. Enter starting and ending dates in the **Date Range** fields and press the **Submit** key to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

A screenshot of the 'Range Lane Use Statistics' report. The report title is 'Range Lane Use Statistics' with a date range of '6/20/2013' to '6/20/2013'. Below the title is a table with columns: Date, Day, Lane Hour, Lane, Type, Checked In, On Lane, Off Lane, Checked Out, In Store, Wait Time, On Range, Delay, and Shooters. The table contains four rows of data for June 10 and 20, 2014. At the bottom of the table, there are average values for each column: Average = 2.25, Average = 0.25, Average = 1.50, Average = 0.00, Average = 1.00.

Date	Day	Lane Hour	Lane	Type	Checked In	On Lane	Off Lane	Checked Out	In Store	Wait Time	On Range	Delay	Shooters
2014 Jun 10	Tuesday	15:00	2	Pistol	03:00 PM	03:01 PM	03:07 PM	03:07 PM	7	1	5	0	1
2014 Jun 10	Tuesday	15:00	4	Pistol	03:04 PM	03:04 PM	03:06 PM	03:06 PM	2	0	1	0	1
2014 Jun 10	Tuesday	15:00	7	Pistol	03:07 PM	03:07 PM	03:07 PM	03:07 PM	0	0	0	0	1
2014 Jun 20	Friday	09:00	3	Rifle	09:25 AM	09:26 AM	09:26 AM	09:26 AM	0	0	0	0	1

2. Click the tab's **Close** button to close the screen.

View the Rental Firearm Statistics Report

Complete the following procedure to view a report showing rental firearms, general information (log number, manufacturer, model, serial number, gauge/caliber, dates of first and last use, and number of rounds fired) for each, and detail information (renter name, date, and number of rounds fired) for each time a firearm was rented.

1. Navigate to the **Rental Firearm Statistics** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Range > Rental Firearm Statistics** from the main menu to display the **Rental Firearm Statistics** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



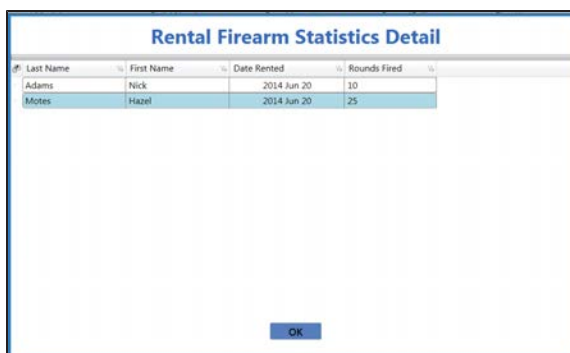
2. Complete the following procedure as needed to view a firearm's detail record:

View a Firearm's Detail Record



#	Log Number	Manufacturer	Model	Serial Number	Barrel Length	Gauge/Caliber	First Use	Last Use	Rounds Fired
1		COLT	COLT ABC	A100	10.000	10 Cal	6/20/2014 9:39 AM	6/20/2014 9:39 AM	0
2		REM	REM	100	6.000	6	6/20/2014 9:28 AM	6/20/2014 9:28 AM	0
3		COLT	COLT XYZ	100	6.000	Remo	6/20/2014 9:28 AM	6/20/2014 9:28 AM	0
2024		REM	REM	REM1234	45	45	6/20/2014 9:39 AM	6/20/2014 9:39 AM	0
2024		REM	REM	REM567	22	22			

1. Click a firearm to display its **Rental Firearm Statistics Detail** window.



#	Last Name	First Name	Date Rented	Rounds Fired
	Adams	Nick	2014 Jun 20	10
	Motes	Hazel	2014 Jun 20	25

OK

2. Click the **OK** button to close the **Rental Firearm Statistics Detail** window.

3. Click the tab's **Close** button to close the screen.

Facilities Management

This section contains procedures to set up, maintain, and review facilities (classrooms, multipurpose rooms, lounges, etc.) and to manage reservations for those facilities.

- [Maintain a Facility \(see page 282\)](#)
- [Manage Facility Reservations \(see page 284\)](#)

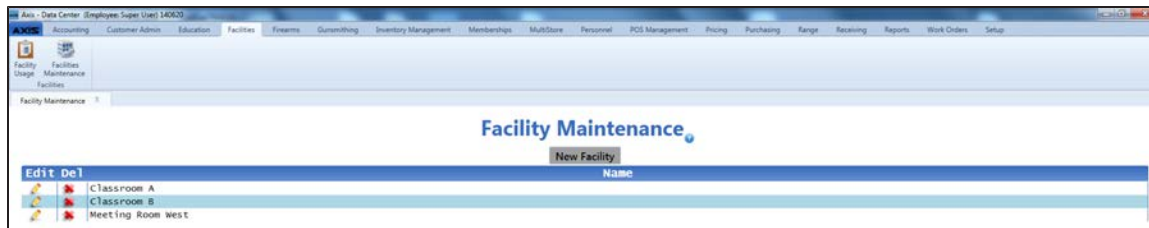
Maintain a Facility

1. Navigate to the **Facility Maintenance** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Facilities > Facility Maintenance** from the main menu to display the **Facility Maintenance** screen.

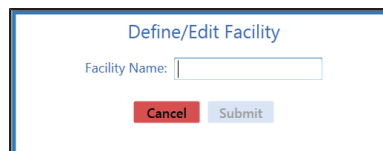


2. Complete the following procedures as appropriate to maintain facilities:

Add a Facility



1. Click the **New Facility** button to display the **Define/Edit Facility** window.

A screenshot of the Define/Edit Facility window. The window title is "Define/Edit Facility". Below the title is a text field labeled "Facility Name:". Below the text field are two buttons: "Cancel" and "Submit".

2. Enter the name for the facility in the **Facility Name** field.

3. Click the **Submit** button to add the new facility to the **Facility Maintenance** screen.

Edit a Facility

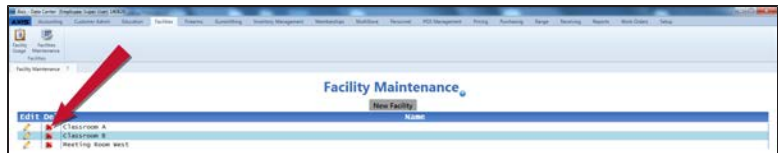


1. Click a facility's **Edit** button to display its **Define/Edit Facility** window.

A screenshot of a "Define/Edit Facility" dialog box. It contains a text input field labeled "Facility Name" with the text "Classroom A" entered. Below the field are two buttons: "Cancel" (red) and "Submit" (blue).

2. Edit the facility name in the **Facility Name** field.
3. Click the **Submit** button to update the facility on the **Facility Maintenance** screen.

Delete a Work Order



1. Click a facility's **Delete** button to display a deletion confirmation window.

A screenshot of a confirmation dialog box with the text "Are you sure you want to delete this Facility?". Below the text are two buttons: "Yes" (blue) and "No" (red).

2. Click the **Yes** button to remove the class from the **Facility Maintenance** screen.
3. Click the tab's **Close** button to close the screen.

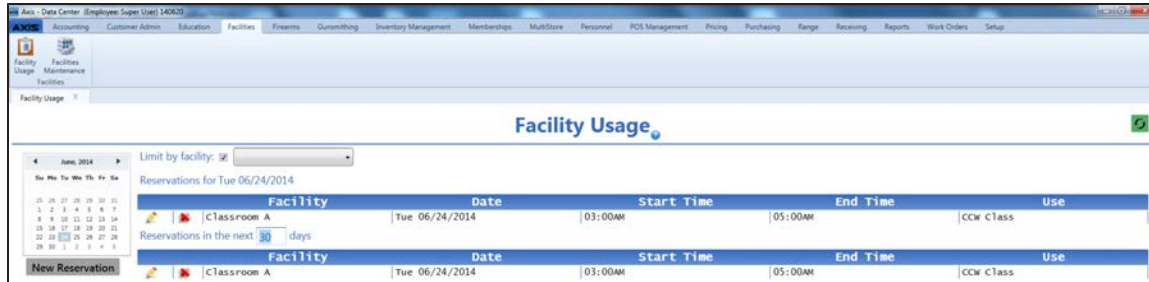
Manage Facility Reservations

1. Navigate to the **Facility Usage** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Facilities > Facility Usage** from the main menu to display the **Facility Usage** screen.



2. Complete the following procedures as needed to display reservations for a specific facility, date, and/or time frame:

- To display only reservations for a specific facility, complete the following procedure:
 1. Check the **Limit by facility** checkbox.
 2. Select the facility from the **Limit by facility** drop-down menu.
- To display only reservations for a specific date, [Select a Date \(see page 24\)](#) on the calendar.
- To display only reservations for a specific time frame, enter the desired number of days in the **Reservations in the next __ days** field.

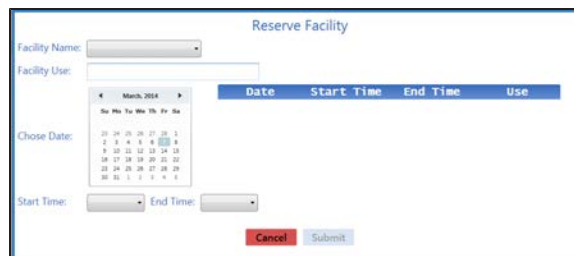
3. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

4. Complete the following procedures as appropriate to manage facility reservations:

Reserve a Facility



1. Click the **New Reservation** button to display the **Reserve Facility** window.



2. Continue with the procedure below.

Edit a Facility Reservation



1. Click the reservation's **Edit** button to display its **Reserve Facility** window.

2. Continue with the procedure below.

Cancel a Facility Reservation



1. Click the reservation's **Delete** button to display a deletion confirmation window.

2. Click the **Yes** button to remove the reservation from the **Facility Usage** screen.

5. Enter/edit Facility Reservation information in the window.

Note: Required fields and settings are displayed with red borders.

Facility Name	Select the facility to be reserved.
Facility Use	Enter the purpose of the reservation (meeting, training, class, etc.).
Choose Date	Select a Date (see page 24) for the reservation.
Start Time	Enter the starting time for the reservation.
End Time	Enter the ending time for the reservation.

6. Click the **Submit** button.

Note: If any date/time combinations conflict with an existing reservation for the same facility, the **Submit** button will remain grayed out.

7. Click the tab's **Close** button to close the screen.

Membership Management

This section contains procedures to set up, edit, and maintain memberships, associated incentives, member lists, billing functions, and histories for individual customers.

Membership Information

Membership Information includes the membership's name, terms, prices, discounts, and billing and expiration dates.

- [Define a Membership \(see page 288\)](#)

Membership Incentives

Membership Incentives are member-only discounts (either percentages or dollar amounts) on selected products. Incentives may be applied to individual products or to all products having a particular attribute/descriptor combination.

- [Define a Membership Incentive \(see page 292\)](#)

Member Lists

Member Lists display all current membership members and the details (name, ID, address, and birth date) for each. Clicking a member displays a record showing associated group members (if applicable) and the details for each.

- [Manage a Membership Member List \(see page 298\)](#)
- [View the Member List for All Memberships \(see page 303\)](#)

Recurring Billing Functions

Recurring Billing Functions provide the ability to collect regular, ongoing membership fees through credit card charges.

- [Manage a Member's Recurring Billing Information \(see page 304\)](#)
- [Manage Recurring Payments \(see page 307\)](#)
- [View Processed Payments \(see page 311\)](#)
- [View Denied Payments \(see page 312\)](#)

Member Histories

Member Histories provide a record of a customer's memberships and associated dates.

- [View and Update a Customer's Memberships \(see page 138\)](#)

Define a Membership

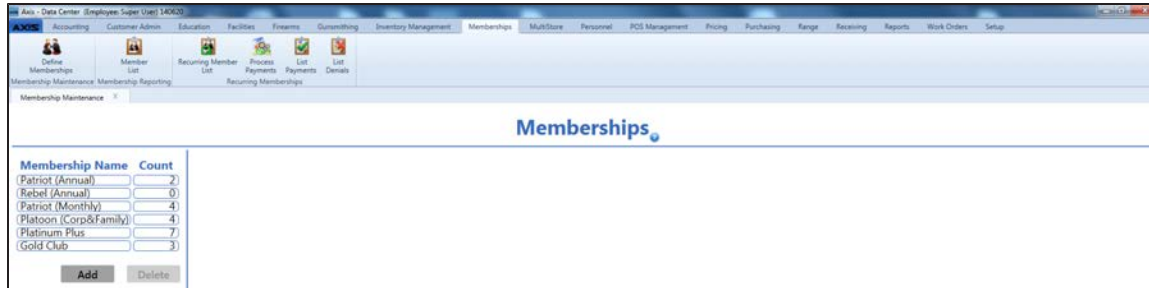
Complete the following procedure to establish or update a membership's name, terms, prices, discounts, and billing and expiration dates.

1. Navigate to the **Memberships** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

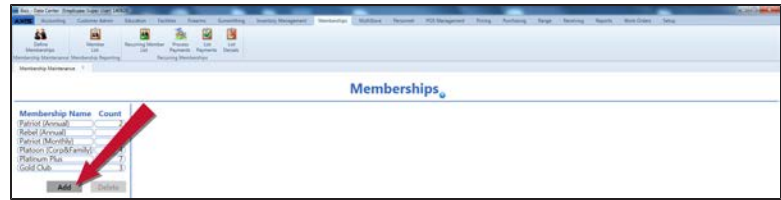


2. Select **Memberships > Define Memberships** from the main menu to display the **Memberships** screen.



2. Complete the following procedures as needed to manage memberships:

Create a New Membership



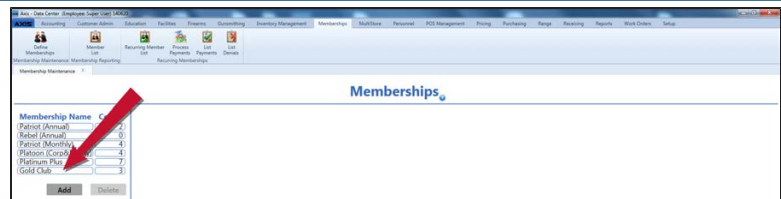
1. Click the **Add** button to display a new membership name window.

2. Enter the name of the membership in the **Membership** field.
3. Click the **OK** button to add the membership to the **Membership Name** list and display its **Define/Edit Membership** section.



4. Continue with the procedure below.

Edit a Membership



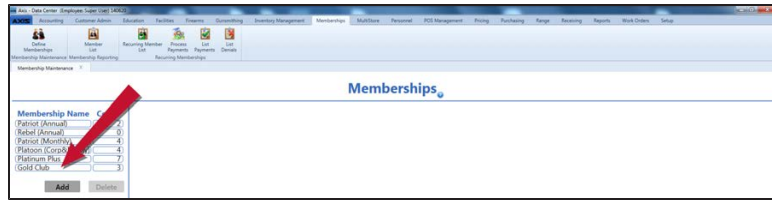
1. Click a membership in the **Membership Name** list to display its **Define/Edit Membership** section.

Membership Incentives	
Description	Percentage Discount Dollar Discount
<input type="checkbox"/> Incentive <small>(Click on incentive group to view and add products)</small>	

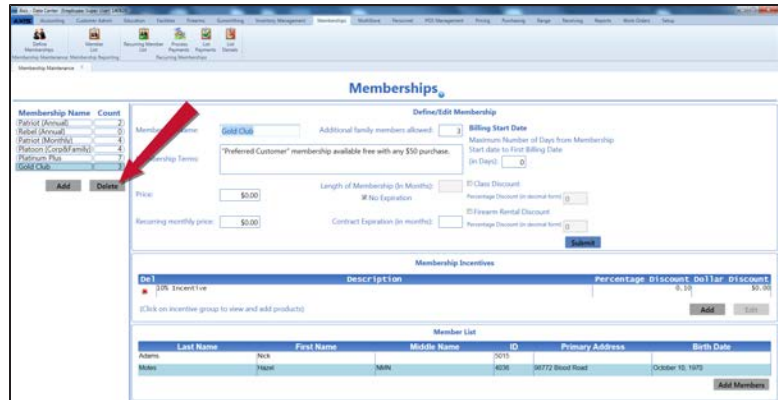
Member List						
Address	Last Name	First Name	Middle Name	ID	Primary Address	Birth Date
	Jack			2015		
	Mike	NAIM	NAIM	8036	96772 2448 1044	OCT04 19 1970

2. Continue with the procedure below.

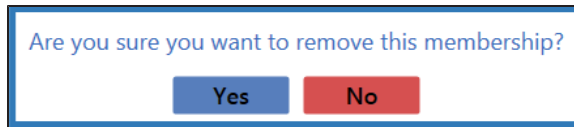
Delete a Membership



1. Click a membership in the **Membership Name** list to display its **Define/Edit Membership** section.



2. Click the **Delete** button to display a deletion confirmation window.



3. Click the **Yes** button to remove the membership from the **Membership Name** list.

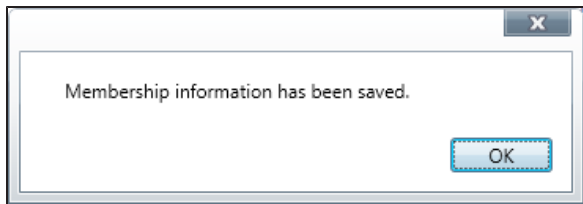
3. Enter/edit Membership information in the **Define/Edit Membership** section.

Note: Required fields and settings are displayed with red borders.

Membership Name	Edit the membership name as needed.
Membership Terms	Enter the membership's terms. The terms entered can serve as a description.
Price	Enter the membership's initial price. If a price is entered, this amount will be charged when the membership is purchased through the Register application. If no price is entered (or the price is set to zero), a member may be added through the Data Center application without an initial transaction.
Recurring Monthly Price	Enter the price to be automatically charged to the member's credit card on a monthly basis. If a recurring price is entered, the system will prompt for credit card information when a membership is purchased through the Register application and allow the operator to modify the recurring billing date if needed.

Additional Family Members Allowed	Enter the number of group/family members that may be added to a member's membership.
Length of Membership	Enter the membership's length in months. If a never-ending membership is desired, enter "9999" in the field.
No Expiration	Check the checkbox to have no expiration for the membership.
Contract Expiration	Enter the membership's contract expiration in months.
Billing Start Date	Enter the maximum number of days that can occur between a member's initial join date and the first billing date.
Class Discount	Check to add a percentage discount on classes.
Percentage Discount	Enter the percentage discount in decimal form (e.g., .25).
Range Rental Discount	Check to add a percentage discount on range firearm rentals.
Percentage Discount	Enter the percentage discount in decimal form (e.g., .25).

- Click the **Submit** button to display a save confirmation window.



- Click the **OK** button to close the window.
- Complete the following procedures as needed:

- [Define a Membership Incentive \(see page 292\)](#)

Note: A membership incentive is a member-only discount (either a percentage or dollar amount) on selected products. An incentive may be applied to individual products or to all products having a particular attribute/descriptor combination.

- [Manage a Membership Member List \(see page 298\)](#)

Note: A member list displays all current members of a membership and the details (name, ID, address, and birth date) for each.

- Click the tab's **Close** button to close the screen.

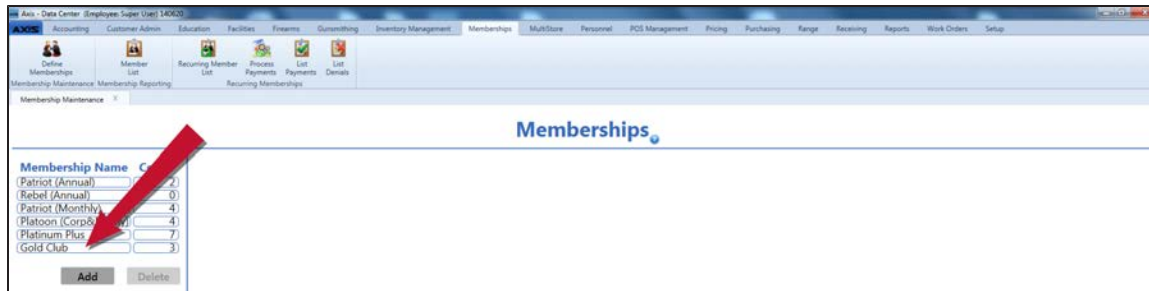
Define a Membership Incentive

Complete the following procedure to establish or update a members-only discount (either a percentage or a dollar amount) on selected products. An incentive discount may be applied to individually selected products or to all products having a specified attribute/descriptor combination.

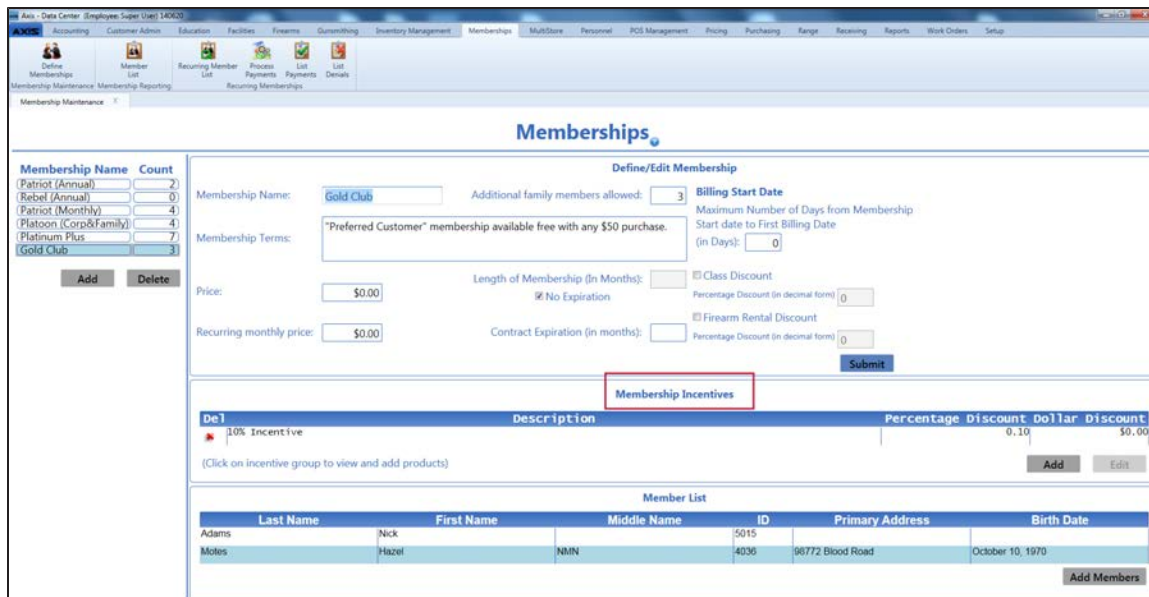
1. Navigate to the **Memberships** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > Define Memberships** from the main menu to display the **Memberships** screen.



2. Click a membership in the **Membership Name** list to display its **Membership Incentives** section.



3. Complete the following procedures as needed to manage the membership's incentives:

Create a New Incentive

The screenshot shows the 'Define/Edit Membership' window in the Membership Management software. The window is divided into several sections:

- Membership Name Count:** A list of membership types with their respective counts. 'Gold Club' is highlighted.
- Membership Name:** A text field containing 'Gold Club'.
- Membership Terms:** A text area containing 'Preferred Customer membership available free with any \$50 purchase.'
- Price:** Fields for 'Price' and 'Recurring monthly price', both set to '\$0.00'.
- Membership Incentives:** A table with columns for 'Incentive', 'Description', 'Percentage Discount', and 'Dollar Discount'. A red arrow points to the 'Add' button at the bottom right of this section.
- Member List:** A table with columns for 'Last Name', 'First Name', 'Middle Name', 'ID', 'Primary Address', and 'Birth Date'. It shows one member: 'Miles, Mark' with ID '8236' and birth date 'October 10, 1979'.

1. Click the **Add** button in the **Membership Incentives** section to display the **Add Membership Incentive** window.

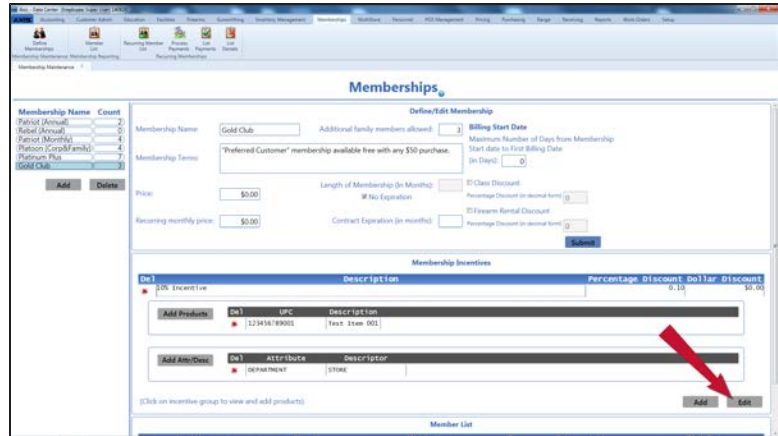
The 'Add Membership Incentive' dialog box is shown, containing the following fields and controls:

- Description:** A text input field.
- Discount Type:** A dropdown menu currently set to 'Percentage'.
- Percentage Discount:** A text input field containing the value '0'.
- Buttons:** 'Cancel' and 'Submit' buttons.

2. Continue with the procedure below.

Edit an Incentive

1. Click an incentive in the **Membership Incentives** section to display its details record.



2. Click the **Edit** button to display the incentive's **Edit Membership Incentive** window.

Edit Membership Incentive

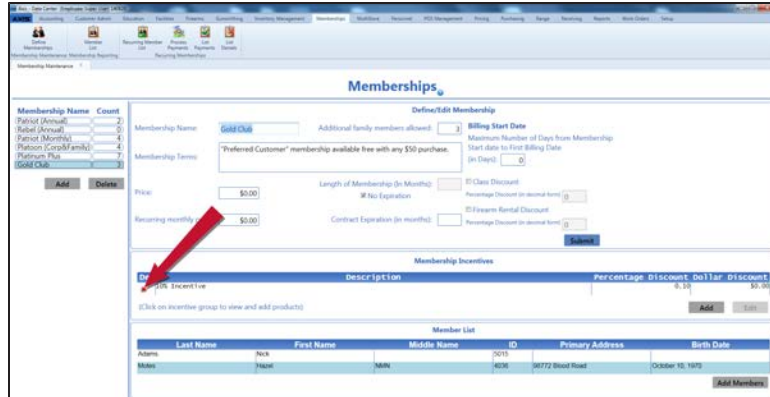
Description:

Discount Type:

Percentage Discount:

3. Continue with the procedure below.

Delete an Incentive



1. Click an incentive's **Delete** button to display a deletion confirmation window.

Are you sure you want to remove this membership incentive?

2. Click the **Yes** button to remove the incentive from the list.

4. Enter/edit Membership Incentive information in the window.

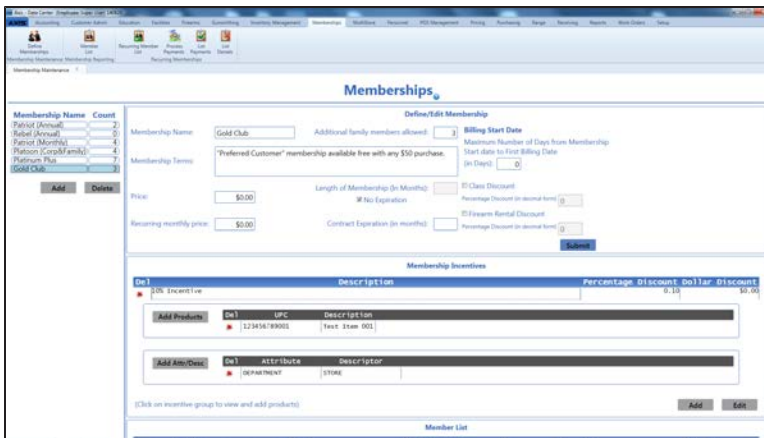
Description	Enter a descriptive name for the incentive.
--------------------	---

Discount Type	Select the type of discount (Percentage or Dollar Amount) from the drop-down.
Percentage Discount / Dollar Discount	Enter the incentive discount (percentage or dollar amount).

- Click the **Submit** button to display a save confirmation window.

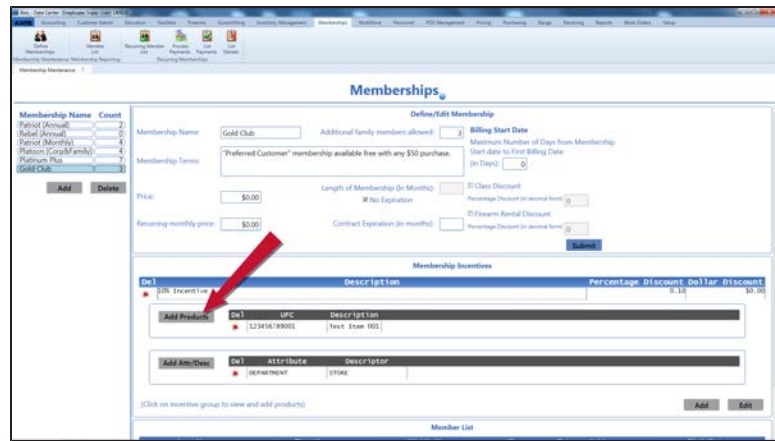
Are you sure you want to save percentage membership incentive?

- Click the **Yes** button to close the window and add/update the incentive on the list of **Membership Incentives**.
- Click the incentive to display its details record, including lists of associated products and attribute/descriptor combinations.



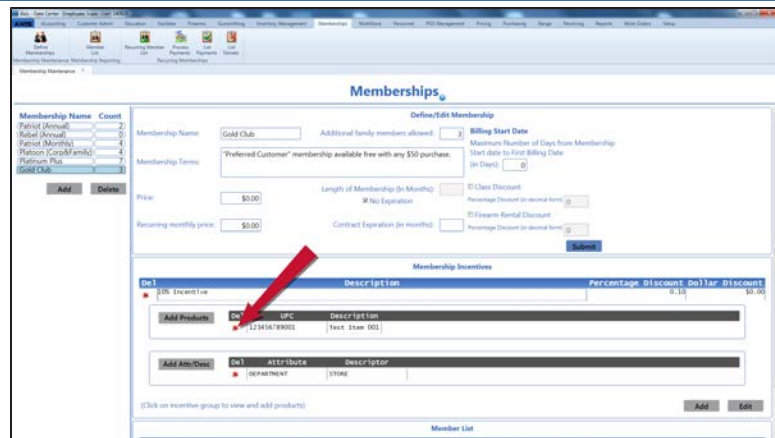
- Complete the following procedures as needed to manage the products/categories associated with the membership incentive:

Add a Product to an Incentive



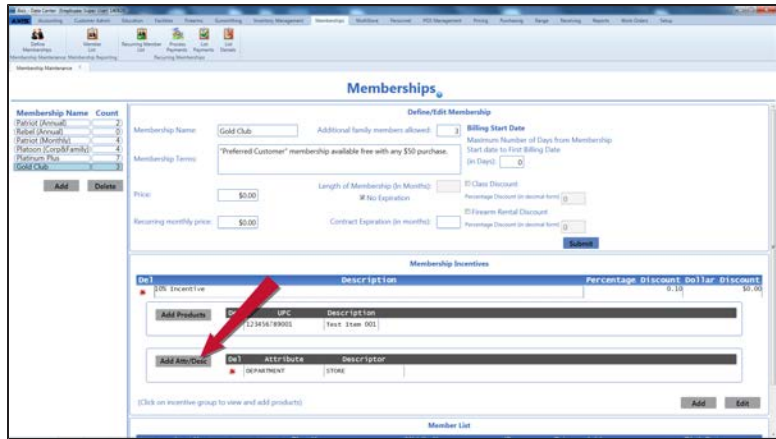
1. Click the **Add Products** button to display the **Product Search** window.
2. [Select One or More Products \(see page 28\)](#) to be added to the category.
3. Click the **Select** button to close the window and add the product(s) to the list.
4. Continue with the procedure below.

Remove a Product from an Incentive

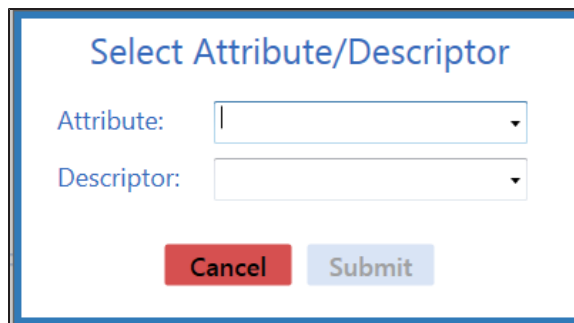


1. Click a product's **Delete** button to remove it from the list.
2. Continue with the procedure below.

Add an Attribute/Descriptor Combination to an Incentive

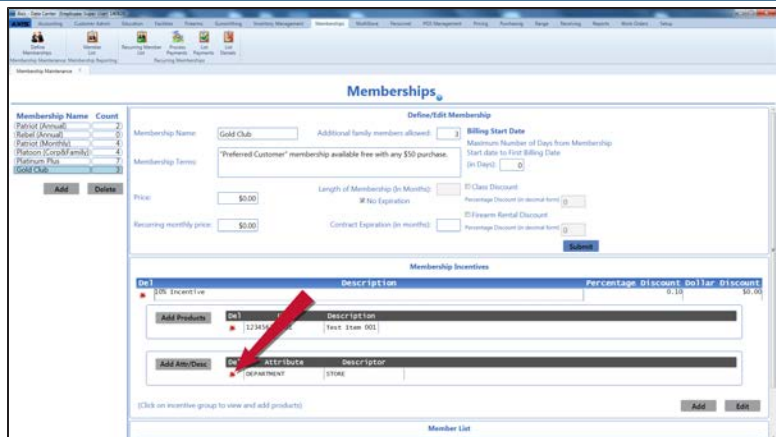


1. Click the **Add Attr/Desc** button to display the **Select Attribute/Descriptor** window.



2. Select an attribute from the **Attribute** drop-down field.
3. Select a descriptor from the **Descriptor** drop-down field.
4. Click the **Submit** button to close the window and add the attribute and descriptor to the list.
5. Continue with the procedure below.

Remove an Attribute/Descriptor Combination from an Incentive



1. Click an attribute/descriptor combination's **Delete** button to remove it from the list.
2. Continue with the procedure below.

9. Double-click the details record to close it.
10. Click the tab's **Close** button to close the screen.

Manage a Membership Member List

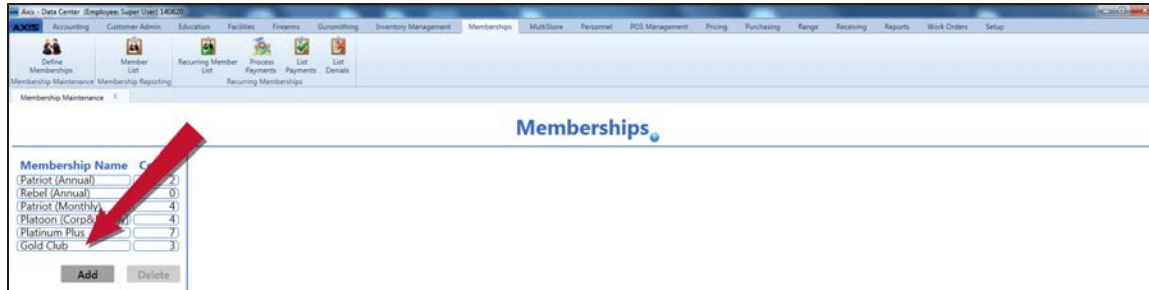
Complete the following procedure to add or remove a membership's members and group/family members (if applicable).

1. Navigate to the **Memberships** screen.

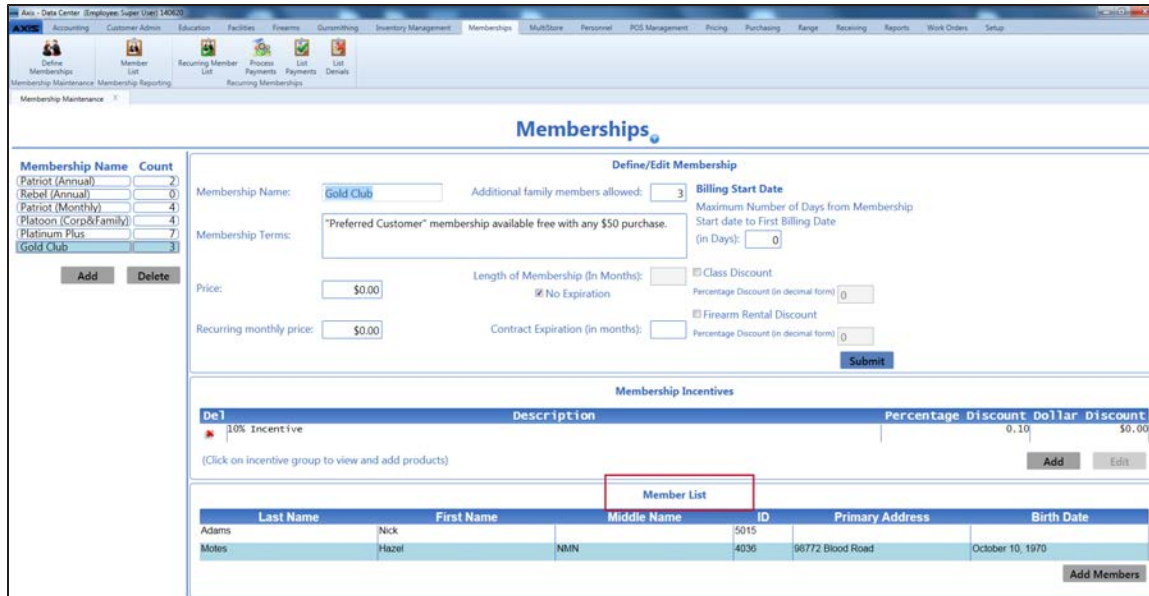
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > Define Memberships** from the main menu to display the **Memberships** screen.



2. Click a membership in the **Membership Name** list to display its **Member List** section.



3. Complete the following procedures as needed manage the membership list:

Add a New Member

Note: This procedure adds an **existing** customer to a membership. To add a new customer to the membership, create a database record for the new customer and then return to this procedure and add the now-existing customer as a member. Refer to [Set Up and Maintain a Customer Record \(see page 114\)](#) for more information.

Description	Percentage Discount	Dollar Discount
10% Incentive	6.34	\$7.00

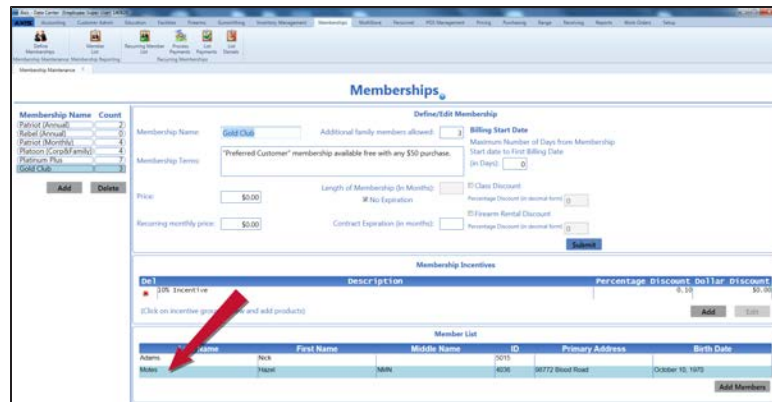
Last Name	First Name	Middle Name	ID	Primary Address	Birth Date
Atkins	Nick		2075		
Miles	Harri	MAR	4236	16772 Sunset Road	October 10, 1972

1. Click the **Add Members** button in the **Member List** section to display the **Customer Look-up** window.

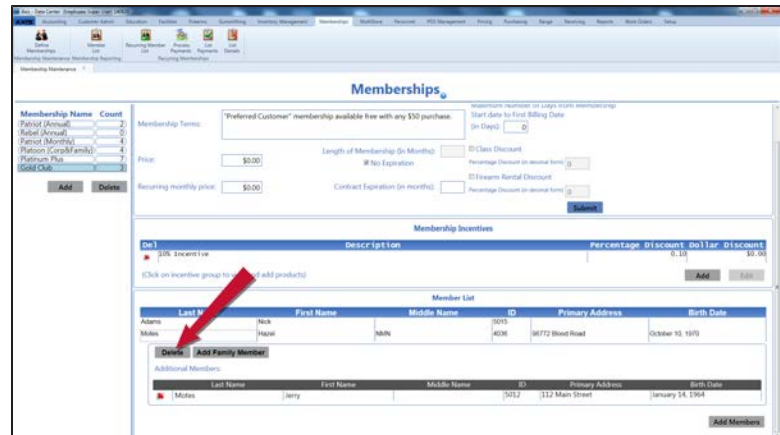
Note: If this button is grayed out, a new member cannot be added to this membership through **Data Center**, but one may be added as a transaction through the **Register** application.

2. If needed, complete either of these procedures to display only matching results on the **Customer Look-up** window:
 - Enter the customer's phone number in the **Phone** field.
 - Enter all or part of the customer's last name in the **Last Name** field and press the **Enter** key.
3. Double-click a customer name to add the customer as a member in the **Member List** section.

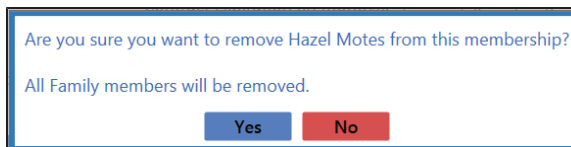
Remove a Member



1. Click a member name in the **Member List** section to display the member's details record.



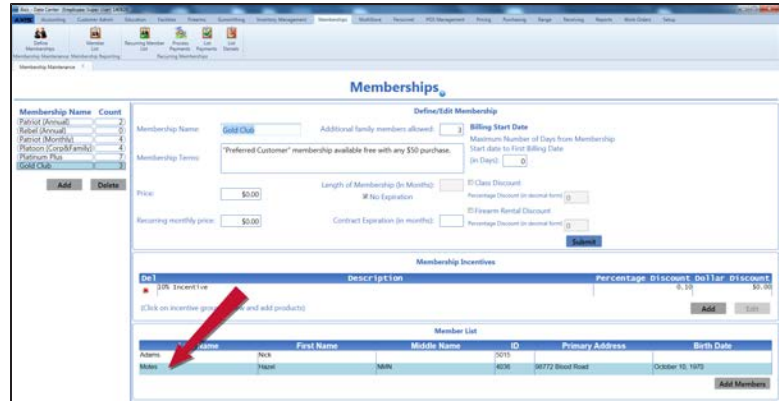
2. Click the **Delete** button to display a deletion confirmation window.



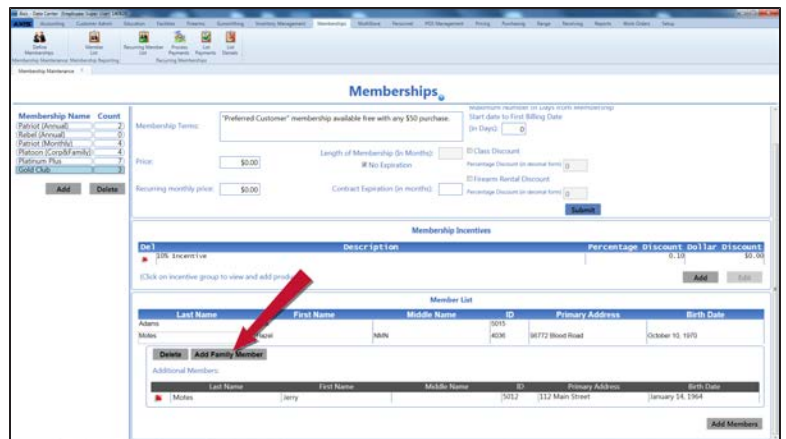
3. Click the **Yes** button to remove the member from the **Member List** section.

Add a Group/Family Member

Note: This procedure adds an **existing** customer to a group membership. To add a new customer to the group membership, create a database record for the new customer and then return to this procedure and add the now-existing customer as a group member. Refer to [Set Up and Maintain a Customer Record \(see page 114\)](#) for more information.



1. Click a member name in the **Member List** section to display the member's details record.

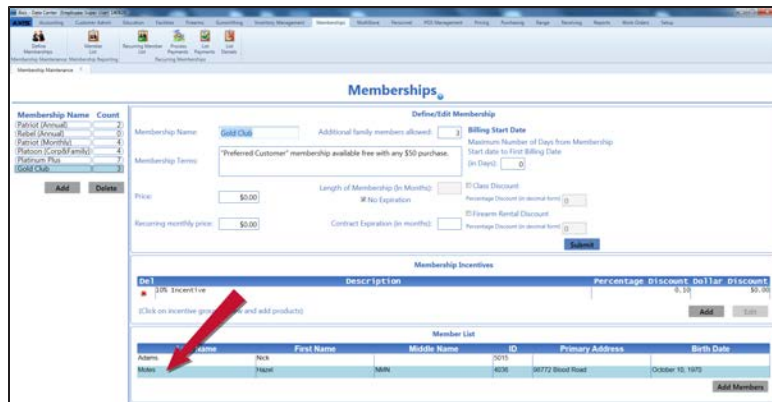


2. Click the **Add Family Member** button to display the **Customer Look-up** window.

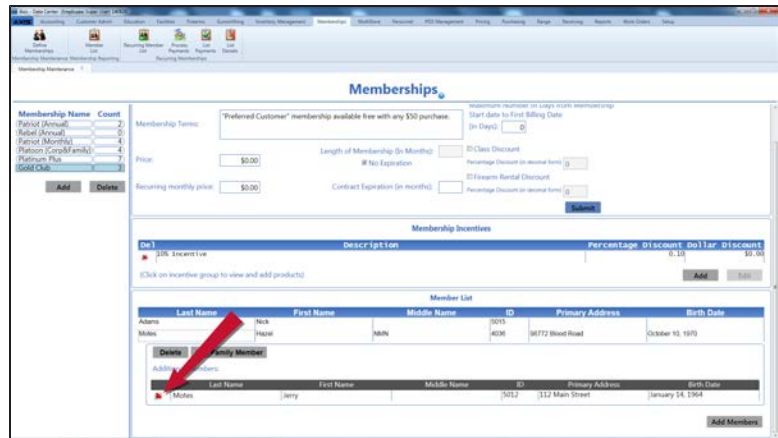
Note: If this button is grayed out, this membership does not offer a group membership option.

3. If needed, complete either of these procedures to display only matching results on the **Customer Look-up** window:
 - Enter the customer's phone number in the **Phone** field.
 - Enter all or part of the customer's last name in the **Last Name** field and press the **Enter** key.
4. Double-click a customer name to add the customer as a group member in the member's **Additional Members** list.
5. Double-click the details record to close it.

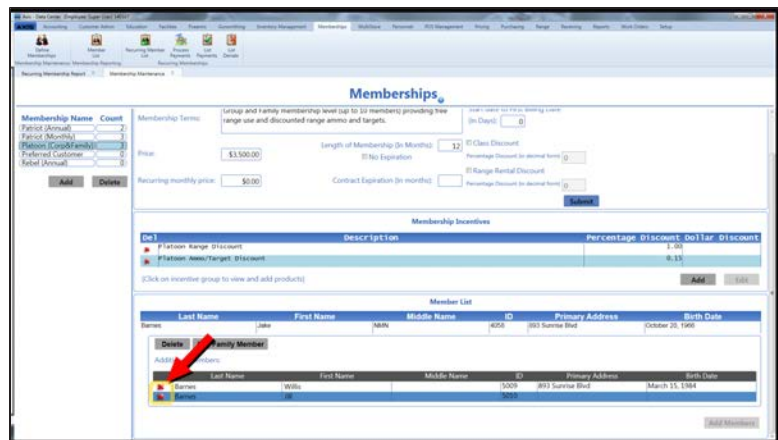
Remove a Group/Family Member



1. Click a member name in the **Member List** section to display the member's details record.



2. Locate the group member to be deleted in the **Additional Members** list.



3. Click the group member's **Delete** button to remove the group member from the **Additional Members** list.

4. Click the tab's **Close** button to close the screen.

View the Member List for All Memberships

1. Navigate to the **Member List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > Member List** from the main menu to display the **Member List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

Membership Name	Last Name	First Name	Address	City	State	Zip	Country	Phone	Start Date	Expiration	Member Card ID	Preferred Email
Gold Club	Adams	Nick							2014 Jun 23	Unlimited	101701005015	
Gold Club	Motes	Hazel	98772 Blood Road	ST CLOUD	MN	56303	UNITED STATES	6526368875	2014 Jun 24	Unlimited	101701004036	black@arss.com
Gold Club	Motes	Jerry	112 Main Street	St Cloud	MN	56303	UNITED STATES	5152524512	2014 Jun 24	Unlimited	101701005012	
Patriot (Annual)	Adams	Nick	PO Box 7854	St Cloud	MN	56304	UNITED STATES	2186812215	2013 Oct 08	2014 Oct 08	101701004026	acusportrt@gmail.com
Patriot (Annual)	Schlegel	Margaret	2678 Main Ave N	St Cloud	MN	56303	UNITED STATES	3207748633	2013 Nov 26	2014 Nov 26	101701004092	mattress@arss.com
Patriot (Monthly)	Barnes	Jake	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3208284971	2013 Sep 27	3680 Mar 27	101701004058	account@arss.com
Patriot (Monthly)	Cauffield	Holden	572 Salinger Road	Sauk Rapids	MN	56379	UNITED STATES	8054159436	2013 Sep 27	2846 Dec 27	101701004007	jfs@arss.com
Patriot (Monthly)	Ellison	Ralph	5552 Invisible Rd	Sauk Rapids	MN	56379	UNITED STATES	3208285547	2013 Sep 27	2846 Dec 27	101701004018	ertgdf@arss.com
Patriot (Monthly)	Milne	Jim	x	x	MN	56303	UNITED STATES		2014 Jan 10	3680 Mar 27	101701005011	
Platinum Plus	McCrae	Augustus	9083 Lonesome Drive	Brainerd	MN	56789	UNITED STATES	2189575548	2014 Jan 10	Unlimited	101701004046	ice@arss.com
Platinum Plus	Meursault	Albert	6789 Stranger Street	St Paul	MN	55797	UNITED STATES	6126365477	2014 Jan 10	Unlimited	101701004057	no@arss.com
Platinum Plus	Milne	Eryore	PO Box 889X	Sartell	MN	56377	UNITED STATES	3204487311	2014 Jan 10	Unlimited	101701004101	crouch@arss.com
Platinum Plus	Moriarty	Dean	PO Box 26401	Fargo	ND	64754	UNITED STATES	7018489975	2014 Jan 10	Unlimited	101701004067	shark@arss.com
Platinum Plus	Motes	Hazel	98772 Blood Road	ST CLOUD	MN	56303	UNITED STATES	6526368875	2014 Jan 10	Unlimited	101701004036	black@arss.com
Platinum Plus	Motes	Jerry	112 Main Street	St Cloud	MN	56303	UNITED STATES	5152524512	2014 Jan 14	Unlimited	101701005012	
Platinum Plus	Zhiwago	Yuri	235 Main St E Suite # 77	St Cloud	MN	56303	UNITED STATES	3208284411	2014 Jan 14	Unlimited	101701004089	rifle@arss.com
Platinum (Corp&Family)	Barnes	Jake	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3208284971	2013 Oct 28	2014 Oct 28	101701004058	account@arss.com
Platinum (Corp&Family)	Barnes	Jill					UNITED STATES		2013 Nov 27	2014 Oct 28	101701005010	
Platinum (Corp&Family)	Barnes	Willis	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3204457172	2013 Oct 28	2014 Oct 28	101701005009	willdance@yahoo.com
Platinum (Corp&Family)	Motes	Hazel	98772 Blood Road	ST CLOUD	MN	56303	UNITED STATES	6526368875	2014 Jan 17	2015 Jan 17	101701004036	black@arss.com

2. Click the tab's **Close** button to close the screen.

Manage a Member's Recurring Billing Information

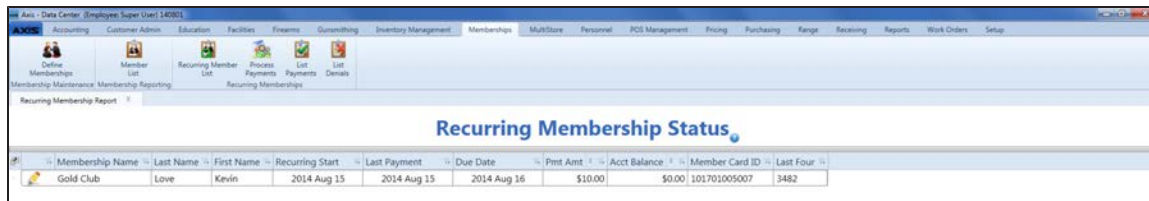
Complete the following procedure to update billing information or renew a membership for a member of a membership with recurring billing.

1. Navigate to the **Recurring Membership Status** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > Recurring Member List** from the main menu to display the **Recurring Membership Status** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed to manage billing information for a member of a membership with recurring billing:

Edit a Member's Billing Information



1. Click the member's **Edit** button to display the **Credit Card Information** window.

Credit Card Information

First Name:

Middle Initial:

Last Name:

Credit card number:

Expiration Date:

Billing Address:

Billing City:

Billing State: Billing Zip:

2. Edit Credit Card information in the window.

Note: Required fields and settings are displayed with red borders.

First Name	Enter the card holder's first name as it appears on the card.
Middle Initial	Enter the card holder's middle initial as it appears on the card.
Last Name	Enter the card holder's last name as it appears on the card.
Credit card number	Enter the credit card number.
Expiration Date	Enter the card's expiration date.
Billing Address	Enter the street address for the card holder's billing address.
Billing City	Enter the city for the card holder's billing address.
Billing State	Enter the state for the card holder's billing address.
Billing Zip	Enter the ZIP code for the card holder's billing address.

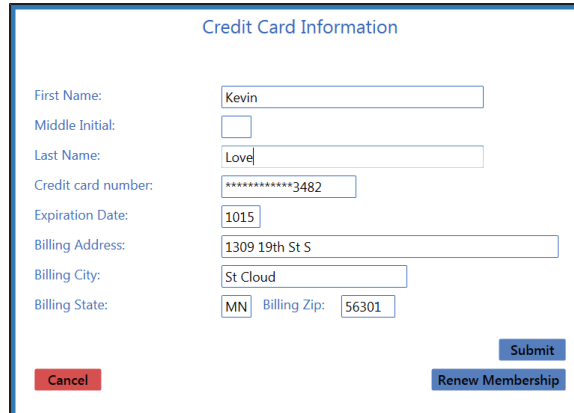
3. Click the **Submit** button to save credit card information.

Renew a Member's Membership



Membership Name	Last Name	First Name	Recurring Start	Last Payment	Due Date	Reg. Amt.	Act Balance	Member Card ID
Patriot (Monthly)	Barnes	Jake	2013 Sep 27	2013 Sep 27	2014 Mar 13	\$125.00	\$0.00	101701004058
Patriot (Monthly)	Caulfield	Hidden	2013 Sep 27	2013 Sep 27	2013 Oct 13	\$125.00	\$0.00	101701004057
Patriot (Monthly)	Ellison	Paula	2013 Sep 27	2013 Sep 27	2013 Sep 28	\$125.00	\$0.00	101701004059

1. Click the member's **Edit** button to display the **Credit Card Information** window.



Credit Card Information

First Name:

Middle Initial:

Last Name:

Credit card number:

Expiration Date:

Billing Address:

Billing City:

Billing State: Billing Zip:

2. Click the **Renew Membership** button to display the **Renew Membership** window.



Renew Membership

Membership Renewal Information

Member Name: Jake Barnes

Membership: Patriot (Monthly)

Member Card ID: 101701004058

Start: 9/27/2013

Expiration Date: 3/27/3680

End: 6/27/4513

3. Click the **Renew Membership** button to display a renewal confirmation window.



Membership was Renewed Successfully!

4. Click the **OK** button to close the confirmation window.
5. Click the **Submit** button to close the **Credit Card Information** window.

3. Click the tab's **Close** button to close the screen.

Manage Recurring Payments

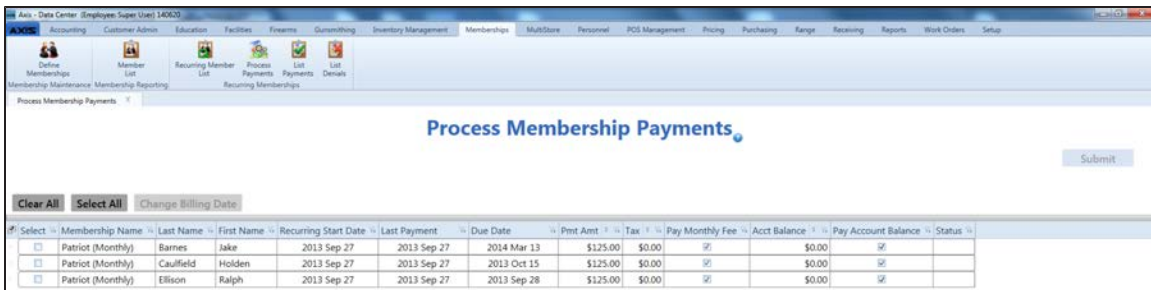
Complete the following procedure to process or update information for recurring payments.

1. Navigate to the **Process Membership Payments** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > Process Payments** from the main menu to display the **Process Membership Payments** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed to manage recurring payments:

Process a Payment

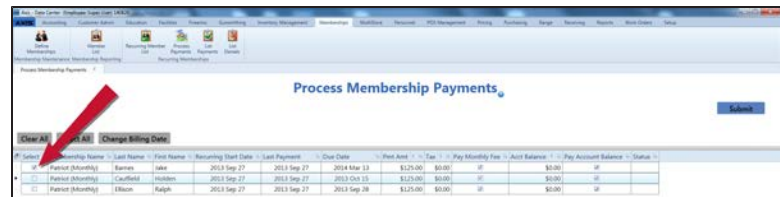
Note: This procedure may be used to process a payment for a single member or to process multiple payments for multiple members.



1. Complete the following procedures as needed to select one or more members for payment processing:
 - Check a member's **Select** checkbox to select the member.
 - Uncheck a member's **Select** checkbox to deselect the member.
 - Click the **Select All** button to select all members for processing.
 - Click the **Clear All** button to deselect all members for processing.
2. If needed, check a member's **Pay Monthly Fee** checkbox to include the monthly membership fee in the payment. (Uncheck the checkbox to process a payment without this amount.)
3. If needed, check a member's **Acct Balance** checkbox to include the balance of the customer's house account in the payment. (Uncheck the checkbox to process a payment without this amount.)
4. Click the **Submit** button to display a **Completed** confirmation note above the **Clear All** and **Select All** buttons.

Modify Payment Information

Note: This procedure may be used to modify payment date and amount for a single member or to modify payment date for multiple members.



1. Complete the following procedures as needed to select one or more members for payment information modification:
 - Check a member's **Select** checkbox to select the member.
 - Uncheck a member's **Select** checkbox to deselect the member.
 - Click the **Select All** button to select all members for modification.
 - Click the **Clear All** button to deselect all members for modification.
2. Complete either of the following as appropriate:
 - If a single member was selected,
 1. Click the **Change Billing Date** button to display a **Change Billing Date** window with member-specific information.

Change Billing Date

Customer Name: Barnes, Jake
Membership: Patriot (Monthly)
Recurring Start Date: Friday, September 27, 2013
Last Payment: Friday, September 27, 2013
Due Date: Tuesday, June 24, 2014
Payment Amount: 125.00


Select a new due date in the future:

Next billing amount:

2. If needed, enter a new due date in the **Select a new due date in the future** field to change the billing date.
3. If needed, enter a new billing amount in the **Next billing amount** field to change the billing amount.
4. Click the **Submit** button to display a verification window.

Changing the 'Next billing amount' will override the prorating during the last 30 days of this membership.
Are you sure you want to continue?

-
- If multiple members were selected,
 1. Click the **Change Billing Date** button to display a **Change Billing Date** window identifying the number of members selected and a date change field.



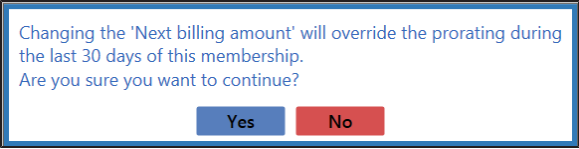
Change Billing Date

You have selected 2 members to change the due date for.

Select a new due date in the future: 6/24/2014 [calendar icon]

Cancel Submit

2. If needed, enter a new due date in the **Select a new due date in the future** field to change the billing date.
3. Click the **Submit** button to display a verification window.



Changing the 'Next billing amount' will override the prorating during the last 30 days of this membership.

Are you sure you want to continue?

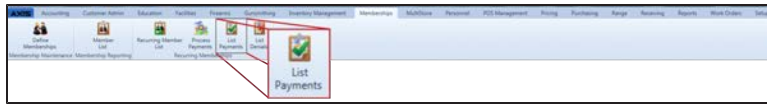
Yes No

3. Click the tab's **Close** button to close the screen.
-

View Processed Payments

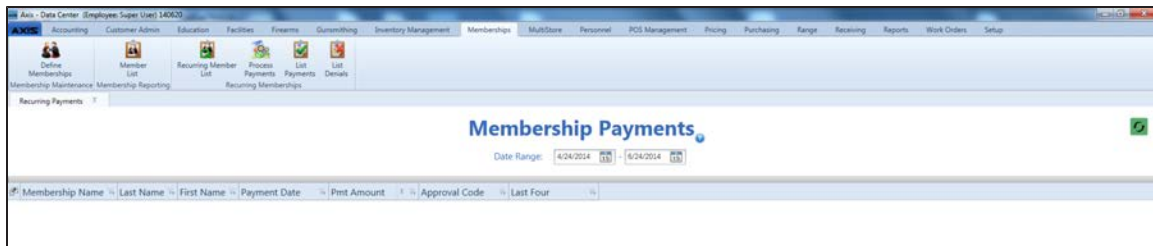
Complete the following procedure to view a record of processed recurring payments.

1. Navigate to the **Membership Payments** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > List Payments** from the main menu to display the **Membership Payments** screen.
3. Enter starting and ending dates in the **Date Range** fields to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

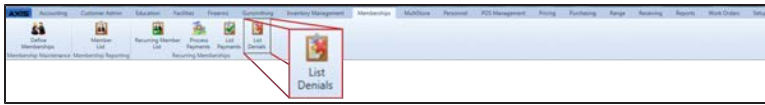


2. Click the tab's **Close** button to close the screen.

View Denied Payments

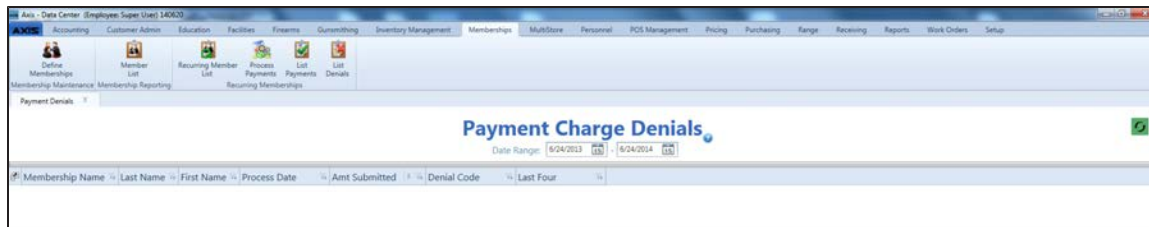
Complete the following procedure to view a record of denied recurring payments.

1. Navigate to the **Payment Charge Denials** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Memberships > List Denials** from the main menu to display the **Payment Charge Denials** screen.
3. Enter starting and ending dates in the **Date Range** fields to display results from that time frame.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the tab's **Close** button to close the screen.

Education Administration

This section contains procedures to set up, edit, and maintain educational classes and associated rosters of participants.

Class Information

Class Information includes the class's title, description, date, time, location, cost, maximum number of participants, and contact person details.

- [Set Up and Edit a Class \(see page 314\)](#)

Class Roster Information

Class Roster Information includes the class information (title, description, date, time, location, cost, maximum number of participants, and contact person) as well as personal information (name, address, phone, and email) for each registered participant.

- [View and Update a Class Roster \(see page 317\)](#)

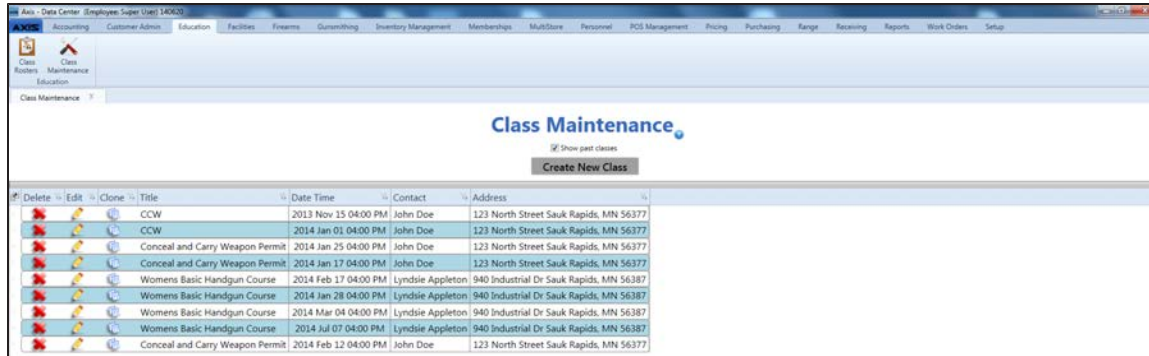
Set Up and Edit a Class

Complete the following procedure to establish or update a class's title, description, date, time, location, cost, maximum number of participants, and contact person details.

1. Navigate to the **Class Maintenance** screen.
 1. Log In to the Data Center Application (see page 16) to display the **Data Center Main Menu** screen.

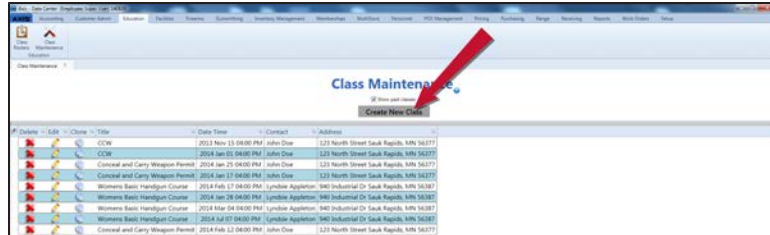


2. Select **Education > Class Maintenance** from the main menu to display the **Class Maintenance** screen.

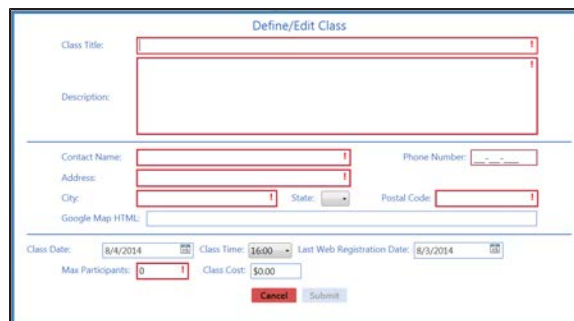


2. If needed, check the **Show Past Classes** checkbox to display all past and present classes.
3. Complete the following procedures as appropriate to manage classes:

Create a New Class



1. Click the **Create New Class** button to display the **Define/Edit Class** window.



Define/Edit Class

Class Title:

Description:

Contact Name: Phone Number:

Address:

City: State: Postal Code:

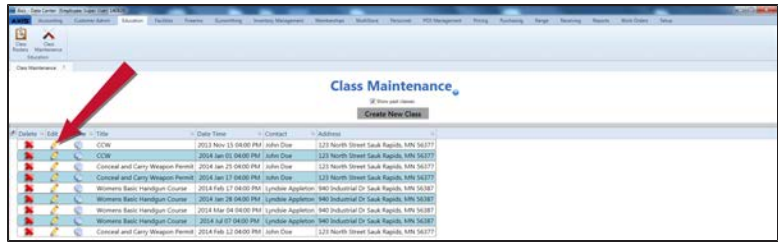
Google Map HTML:

Class Date: Class Time: Last Web Registration Date:

Max Participants: Class Cost:

2. Continue with the procedure below.

Edit a Class



1. Click a class's **Edit** button to display its **Define/Edit Class** window.

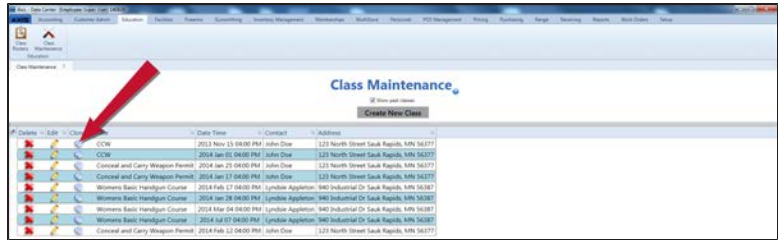
The 'Define/Edit Class' window shows the following information:

- Class Title:** CCW
- Description:** Concealed Carry Weapon Permit - Our Minnesota permit to carry course covers all the fundamentals that a student needs to know to carry a pistol for self-defense in Minnesota.
- Contact Name:** John Doe
- Phone Number:** 555-555-5555
- Address:** 123 North Street
- City:** Sauk Rapids
- State:** MN
- Postal Code:** 56377
- Google Map HTML:** (empty field)
- Class Date:** 11/15/2013
- Class Time:** 16:00
- Last Web Registration Date:** 11/14/2013
- Max Participants:** 20
- Class Cost:** \$20.00

Buttons: **Cancel**, **Submit**

2. Continue with the procedure below.

Clone a Class

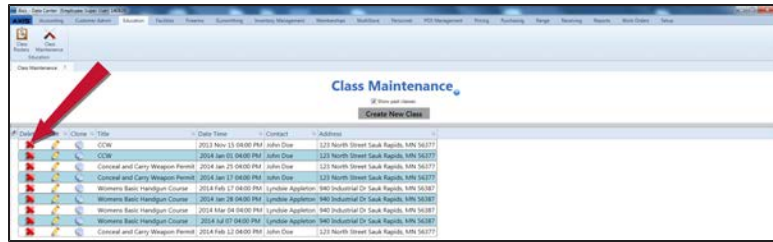


1. Click a class's **Clone Class Information** button to display a completed **Define/Edit Class** window.

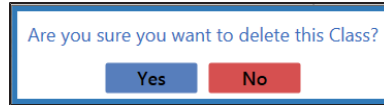
This screenshot is identical to the one above, showing the 'Define/Edit Class' window for the 'CCW' class.

2. Continue with the procedure below.

Delete a Class



1. Click a product's **Delete** button to display a deletion confirmation window.



2. Click the **Yes** button to remove the class from the list on the **Class Maintenance** screen.

4. Enter/edit Class information in the window to reflect information for the appropriate class.

Note: Required fields and settings are displayed with red borders.

Class Title	Enter the title of the class. The Class Title will display on the Register screen.
Description	Enter an extensive description of the class. The Description will display on the Register screen when the Class Title is clicked and may be used to explain the class to customers.
Contact Name	Enter the name of the contact person for the class.
Phone Number	Enter the contact person's phone number (xxx-xxx-xxxx).
Address	Enter the class location's street address.
City	Enter the class location's city.
State	Select the 2-letter abbreviation of the class location's state.
Postal Code	Enter the class location's ZIP code.
Google Map HTML	Enter the URL of the Google Map coordinates of the class's location. (This information will be useful when future software developments allow for online class registration.)
Class Date	Enter the class's date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Class Time	Select the class's start time (24-hour/military clock) from the drop-down menu.
Last Web Registration Date	Enter the last date for class registration (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button. (The system automatically enters the day before the class's start date, but the date can be edited to provide adequate lead time for the instructor.)
Max Participants	Enter the maximum number of participants that may enroll in the class.
Class Cost	Enter the cost for the class.

5. Click the **Submit** button to add/update the class on the **Class Maintenance** screen.
6. Click the tab's **Close** button to close the screen.
7. If needed, [Manage Facility Reservations \(see page 284\)](#) (classroom, range, etc.) for the class.

View and Update a Class Roster

Complete the following procedure to review, update, and utilize a class's roster of registered participants.

1. Navigate to the **Class Rosters** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Education > Class Rosters** from the main menu to display the **Class Rosters** screen.

Title	Date / Time	Instructor/Contact	Max Attendees	Seats Left	Location
CCW	Friday, November 15, 2013 4:00 PM	John Doe	20	17	123 North Street Sauk Rapids, MN 56377
CCW	Wednesday, January 01, 2014 4:00 PM	John Doe	20	18	123 North Street Sauk Rapids, MN 56377
Conceal and Carry Weapon Permit	Friday, January 17, 2014 4:00 PM	John Doe	20	20	123 North Street Sauk Rapids, MN 56377
Conceal and Carry Weapon Permit	Saturday, January 25, 2014 4:00 PM	John Doe	20	18	123 North Street Sauk Rapids, MN 56377
Womens Basic Handgun Course	Tuesday, January 28, 2014 4:00 PM	Lyndsie Appleton	20	20	940 Industrial Dr Sauk Rapids, MN 56387
Conceal and Carry Weapon Permit	Wednesday, February 12, 2014 4:00 PM	John Doe	20	20	123 North Street Sauk Rapids, MN 56377
Womens Basic Handgun Course	Monday, February 17, 2014 4:00 PM	Lyndsie Appleton	20	20	940 Industrial Dr Sauk Rapids, MN 56387
Womens Basic Handgun Course	Tuesday, March 04, 2014 4:00 PM	Lyndsie Appleton	20	20	940 Industrial Dr Sauk Rapids, MN 56387
Womens Basic Handgun Course	Monday, July 07, 2014 4:00 PM	Lyndsie Appleton	20	15	940 Industrial Dr Sauk Rapids, MN 56387

2. If needed, check the **Show Historical Classes** checkbox (and click the **Refresh** button) to display all past and present classes.
3. Click a class to display its **Course Description** record and a roster of registered participants.

Title	Date / Time	Instructor/Contact	Max Attendees	Seats Left	Location
CCW	Friday, November 15, 2013 4:00 PM	John Doe	20	17	123 North Street Sauk Rapids, MN 56377

Course Description: Conceal and Carry Weapon Permit - Our Minnesota permit to carry course covers all the fundamentals that a student needs to know to carry a pistol for self defense in Minnesota.

Check In	First Name	Last Name	Address	City	State	Zip	Country	Phone	Email
<input type="checkbox"/>	Jake	Barnes	893 Sunrise Blvd	St Cloud	MN	56301	UNITED STATES	3208284971	account@arss.com
<input checked="" type="checkbox"/>	Sebastian	Flyte	9989 Brideshead Rd	Waite Park	MN	56387	UNITED STATES	3208287745	bullet@arss.com
<input type="checkbox"/>	Augie	March	4253 End Street	St Cloud	MN	56303	UNITED STATES	3205591100	jabber@arss.com

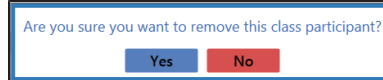
CCW	Wednesday, January 01, 2014 4:00 PM	John Doe	20	18	123 North Street Sauk Rapids, MN 56377
Conceal and Carry Weapon Permit	Friday, January 17, 2014 4:00 PM	John Doe	20	20	123 North Street Sauk Rapids, MN 56377

4. Complete the following procedures as appropriate to manage class rosters:

Edit a Class Roster



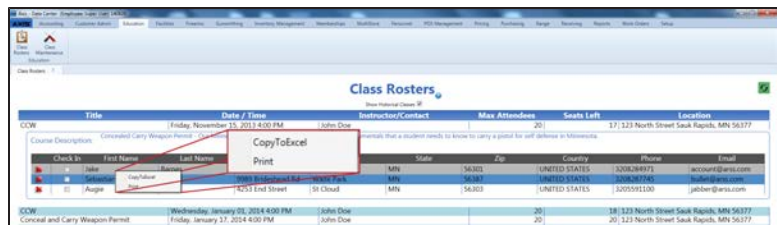
1. Click a participant's **Delete** button to display a removal confirmation window.



2. Click the **Yes** button to remove the name from the roster.
3. Continue with the procedure below to close the roster and the screen.

Print a Class Roster/Check-In Form

1. Right-click in the roster section to display a menu of options.



2. Click the **Copy To Excel** option to open the Excel program and display the roster as a spreadsheet.
3. Select **File > Save As** from the menu bar to display the **Save As** window.
4. Save and print the document for use as a hardcopy check-in form.
5. Continue with the procedure below to close the roster and the screen.

6. Double-click the **Course Description** record to close the roster.
7. Click the tab's **Close** button to close the screen.

Pricing Administration

This section contains procedures to set up, edit, and maintain price types, tax types, and special pricing calculators including markup categories, sales events, and split quantity events.

Price Types

Price Types allow supplemental pricing information (e.g., MSRP, MAP, etc.) to be associated with a product to aid purchasing and management decisions.

- [Manage Price Types \(see page 320\)](#)

Tax Types

Tax Types allow specific taxes (e.g., State, City, Firearms, etc.) to be associated with a product. A Tax Rate may be assigned to a Tax Type for a defined period of time.

- [Manage Tax Types \(see page 321\)](#)

Markup Categories

Markup Categories calculate new prices for associated products using a specified markup (dollar amount or percentage) method.

- [Manage Markup Categories \(see page 323\)](#)

Sales Events

Sales Events define time periods during which the system calculates temporary sale prices for associated products using a specified adjustment (dollar amount or percentage) method.

- [Manage Sales Events \(see page 327\)](#)

Split Quantity Pricing Events

Split Quantity Pricing Events define time periods during which the system calculates special prices for associated products purchased in defined quantities using a specified adjustment (dollar amount or percentage) method.

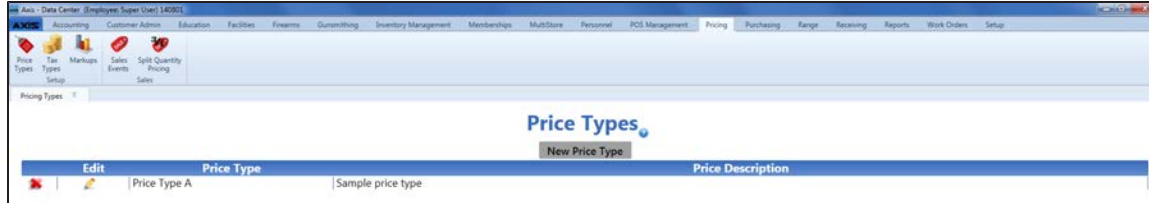
- [Manage Split Quantity Pricing Events \(see page 331\)](#)

Manage Price Types

1. Navigate to the **Price Types** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Pricing > Price Types** from the main menu to display the **Price Types** screen.



2. Complete the following procedures as needed to manage price types:

Set Up a New Price Type

1. Click the **New Price Type** button to display the **Define/Edit Price Type** window.
2. Continue with the procedure below.

Edit a Price Type

1. Click a pricing type's **Edit** button to display its **Define/Edit Price Type** window.
2. Continue with the procedure below.

Delete a Price Type

1. Click a pricing type's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the pricing type from the **Price Types** screen.
3. Click the tab's **Close** button to close the screen.

3. Enter/edit the pricing type's name in the **Pricing Type** field.
4. Enter/edit the pricing type's description in the **Description** field.
5. Click the **Submit** button to display the new/updated pricing type on the **Price Types** screen.
6. Click the tab's **Close** button to close the screen.

Manage Tax Types

1. Navigate to the **Tax Types** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Pricing > Tax Types** from the main menu to display the **Tax Types** screen.



2. Complete the following procedures as needed to manage tax types:

Set Up a New Tax Type

1. Click the **New Tax Type** button to display the **Define/Edit Tax Type** window.
2. Continue with the procedure below.

Edit a Tax Type

1. Click a tax type's **Edit** button to display its **Define/Edit Tax Type** window.
2. Continue with the procedure below.

Add a Tax Rate to a Tax Type

1. Click a tax type's **Rates** button to display its **Tax Rate Information** window.



2. Enter the tax rate as a decimal in the **Rate (in decimal form)** field.
3. Enter the date to start collecting the tax in the **Start Date** field.
4. Click the **Submit** button to add the new tax rate to the **Tax Rate Information** window.
5. Click the **Close** button to close the **Tax Rate Information** window.

Note: The tax type's **Current Rate** column on the **Tax Types** screen will display "0.0000" until the tax rate's start date.

Remove a Tax Rate from a Tax Type

1. Click a tax type's **Rates** button to display its **Tax Rate Information** window.

The screenshot shows a window titled "Tax Rate Information" with a sub-header "STATE TAX". It contains a table with the following data:

Delete	Tax Rate	Start Date	End Date
	0.0650	September 25, 2013	February 20, 2014
	0.07	February 20, 2014	December 31, 9999

Below the table is a form with the following fields and buttons:

- Rate (in decimal form):
- Start Date:
- Submit:
- Close:

2. Click a tax rate's **Delete** button to remove it from the list.
3. Click the **Close** button to close the **Tax Rate Information** window.

Delete a Tax Type

1. Click a tax type's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the tax type from the **Tax Types** screen.
3. Click the tab's **Close** button to close the screen.

3. Enter/edit the tax type's name in the **Tax Type** field.
4. Enter/edit the tax type's description in the **Description** field.
5. Click the **Submit** button to display the new/updated tax type on the **Tax Types** screen.
6. If needed, define a tax rate for this tax type.

Note: Refer to [Add a Tax Rate to a Tax Type](#) for more information.

7. Click the tab's **Close** button to close the screen.

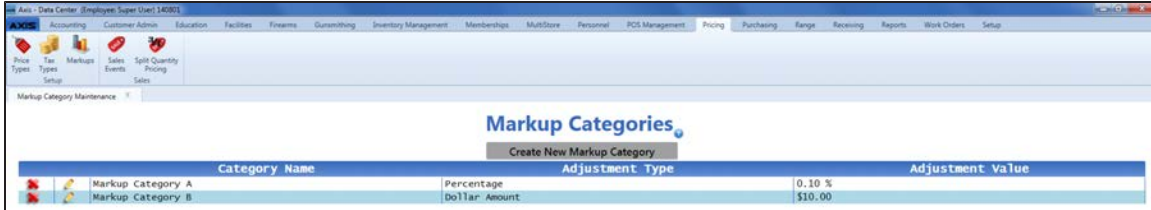
Manage Markup Categories

1. Navigate to the **Markup Categories** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Pricing > Markups** from the main menu to display the **Markup Categories** screen.



2. Complete the following procedures as needed to manage markup categories:

Set Up a New Markup Category

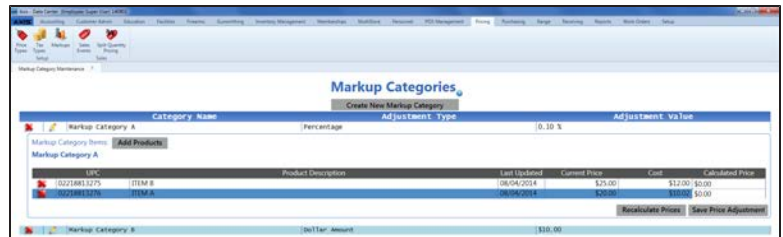
1. Click the **Create New Markup Category** button to display the **Define/Edit Markup Category** window.
2. Continue with the procedure below.

Edit a Markup Category

1. Click a category's **Edit** button to display its **Define/Edit Markup Category** window.
2. Continue with the procedure below.

Add a Product to a Markup Category

1. Click a category to display its **Markup Category Items** record.



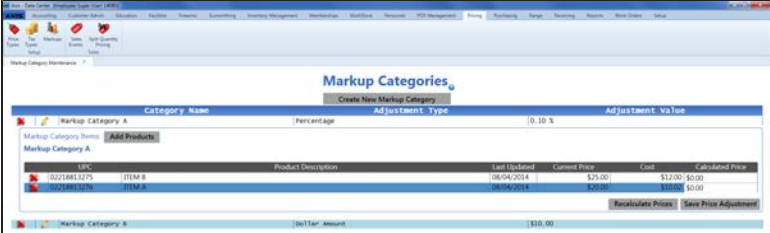
2. Click the **Add Products** button to display the **Product Search** window.
3. [Select One or More Products \(see page 28\)](#) to be added to the category.
4. If needed, recalculate product prices set new prices for added products.

Note: Refer to [Recalculate Product Prices with a Markup Category](#) for more information.

5. Double-click the **Markup Category Items** record to close it.
6. Click the tab's **Close** button to close the screen.

Remove a Product from a Markup Category

1. Click a category to display its **Markup Category Items** record.



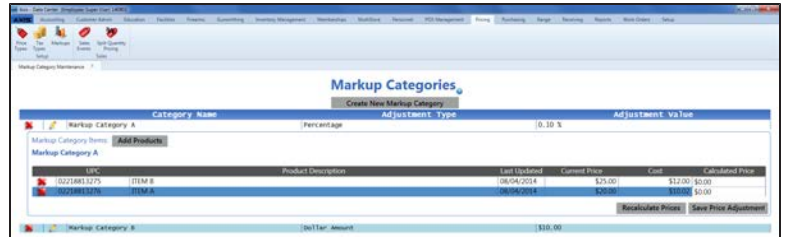
Category Name	Adjustment Type	Adjustment Value
Markup Category A	Percentage	0.10 %

Item ID	Item Name	Product Description	Unit Stocked	Current Price	Cost	Calculated Price
100218815275	ITEM B		10/04/2014	\$25.00	\$12.00	\$0.00
100218815276	ITEM A		10/04/2014	\$20.00	\$10.00	\$0.00

2. Click a product's **Delete** button to display a deletion confirmation window.
3. Click the **Yes** button to remove the product from the **Markup Category Items** record.
4. Double-click the **Markup Category Items** record to close it.
5. Click the tab's **Close** button to close the screen.

Recalculate Product Prices with a Markup Category

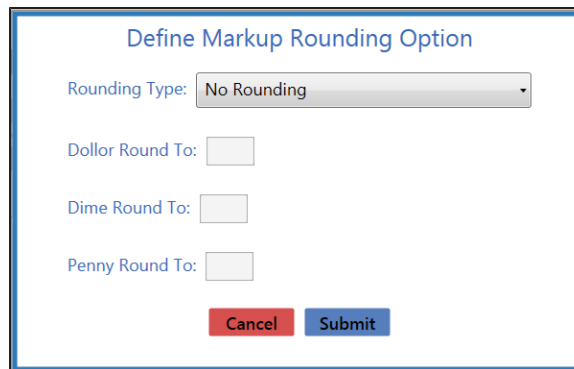
1. Click a category to display its **Markup Category Items** record.



2. If needed, add one or more products to the markup category.

Note: Refer to [Add a Product to a Markup Category](#) for more information.

3. Click the **Recalculate Prices** button to display the **Define Markup Rounding Option** window.

A screenshot of a dialog box titled "Define Markup Rounding Option". The dialog box has a "Rounding Type:" label followed by a dropdown menu currently set to "No Rounding". Below this, there are three input fields: "Dollar Round To:", "Dime Round To:", and "Penny Round To:". At the bottom of the dialog box, there are two buttons: "Cancel" and "Submit".

4. Select one of these rounding methods from the **Rounding Type** drop-down field:
 - **No Rounding** : Calculates a price that is equal to the **Current Price**.
 - **Round to Nearest Value** : Calculates a price by rounding the cost up or down to the closest amount that matches the **Round To** settings.
 - **Round Up** : Calculates a price by rounding the cost up to the next higher amount that matches the **Round To** settings.
 - **Round Down** : Calculates a price by rounding the cost down to the next lower amount that matches the **Round To** settings.
5. If needed, enter values in the **Dollar Round To**, **Dime Round To**, and/or **Penny Round To** fields to generate calculated prices with specific digits in designated places.
6. Click the **Submit** button to display a recalculated price in the product's **Calculated Price** field.
7. If desired, click the **Save Price Adjustment** button to save the calculated price for the product.
8. Double-click the **Markup Category Items** record to close it.
9. Click the tab's **Close** button to close the screen.

Delete a Markup Category

1. Click a category's **Delete** button to display a deletion confirmation window.
 2. Click the **Yes** button to remove the category from the **Markup Categories** screen.
 3. Click the tab's **Close** button to close the screen.
-
3. Enter/edit the category's name in the **Category Name** field.
 4. Select an adjustment type from the **Adjustment Type** drop-down field:
 - Select **Dollar Amount** to mark up prices by a fixed amount.
 - Select **Percentage** to mark up prices by a percentage of cost.
 5. Enter a value in the **Adjustment Value** field:
 - If **Dollar Amount** was selected as the **Adjustment Type**, enter the markup amount in dollars.
 - If **Percentage** was selected as the **Adjustment Type**, enter the markup amount as a percentage.
 6. Click the **Submit** button to display the new/updated category on the **Markup Categories** screen.
 7. Click the tab's **Close** button to close the screen.

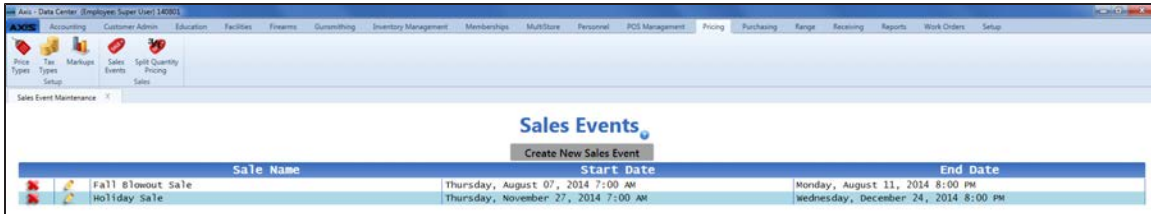
Manage Sales Events

1. Navigate to the **Sales Events** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Pricing > Sales Events** from the main menu to display the **Sales Events** screen.



2. Complete the following procedures as needed to manage sales events:

Set Up a New Sales Event

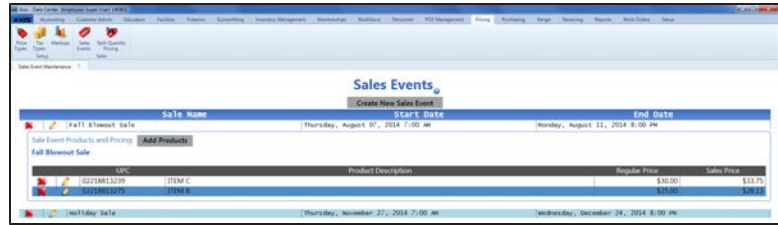
1. Click the **Create New Sales Event** button to display the **Define/Edit Sales Event** window.
2. Continue with the procedure below.

Edit a Sales Event

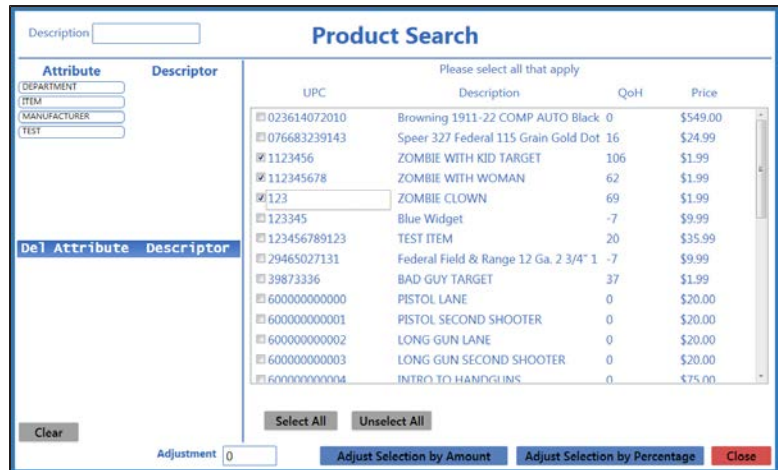
1. Click an event's **Edit** button to display its **Define/Edit Sales Event** window.
 2. Continue with the procedure below.
-

Add a Product to a Sales Event

1. Click an event to display its **Sale Event Products and Pricing** record.



2. Click the **Add Products** button to display the **Product Search** window.



3. Complete any of these procedures to limit the number of products shown:
 - Enter all or part of a product's description in the **Description** field.
 - Enter all or part of a product's UPC code number in the **UPC** field.
 - Click an **Attribute** button and one of its associated **Descriptor** buttons. (Repeat as needed to further restrict products with additional attributes and descriptors.)
 - Click the **Clear** button to remove all Attribute/Descriptor filters.
4. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Unselect All** button to deselect all products.
5. Complete one of these procedures as appropriate to add the selected product(s) and adjusted price(s) to the **Sale Event Products and Pricing** record:
 - To adjust the price(s) by a dollar amount
 1. Enter the dollar amount in the **Adjustment** field.

Be sure to include a minus sign (-) to reduce the price by that amount.

2. Click the **Adjust Selection by Amount** button.
- To adjust the price(s) by a percentage,
 1. Enter the percentage as a decimal in the **Adjustment** field. Be sure to include a minus sign (-) to reduce the price by that percentage.
 2. Click the **Adjust Selection by Percentage** button.
6. If needed, edit a product's sales price.

Note: Refer to [Edit a Product's Sales Event Price](#) for more information.

7. Double-click the **Sale Event Products and Pricing** record to close it.
8. Click the tab's **Close** button to close the screen.

Remove a Product from a Sales Event

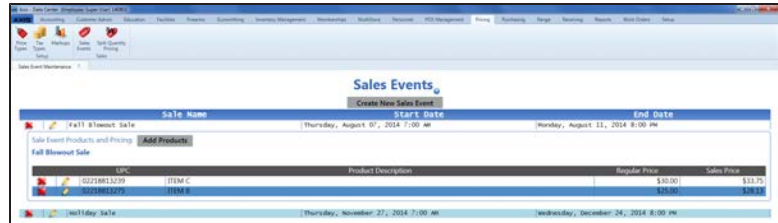
1. Click an event to display its **Sale Event Products and Pricing** record.



2. Click a product's **Delete** button to display a deletion confirmation window.
 3. Click the **Yes** button to remove the product from the **Sale Event Products and Pricing** record.
 4. Double-click the **Sale Event Products and Pricing** record to close it.
 5. Click the tab's **Close** button to close the screen.
-

Edit a Product's Sales Event Price

1. Click an event to display its **Sale Event Products and Pricing** record.



2. If needed, add one or more products to the sale event.

Note: Refer to [_](#) for more information.

3. Click a product's **Edit** button to display the **Edit Sale Price** window.

The 'Edit Sale Price' window displays the following information: UPC: 02218813276, Lite Rail Barrel Nut Wrench, and Description: . Below this, there is a 'Sale Price:' label followed by a text input field containing the value '17.00'. At the bottom of the window, there are two buttons: 'Cancel' and 'Submit'.

4. Enter the new sale price in the **Sale Price** field.
5. Click the **Submit** button to display the new price in the product's **Sales Price** field.
6. Double-click the **Sale Event Products and Pricing** record to close it.
7. Click the tab's **Close** button to close the screen.

Delete a Sales Event

1. Click an event's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the category from the **Sales Events** screen.
3. Click the tab's **Close** button to close the screen.

3. Enter/edit the sales event's name in the **Event Name** field.
4. Enter/edit the event's start date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Start Date** field.
5. Enter/edit the event's start time in the **Start Time** field.
6. Enter/edit the event's end date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **End Date** field.
7. Enter/edit the event's end time in the **End Time** field.
8. Click the **Submit** button to display the new/updated event on the **Sales Events** screen.
9. Click the tab's **Close** button to close the screen.

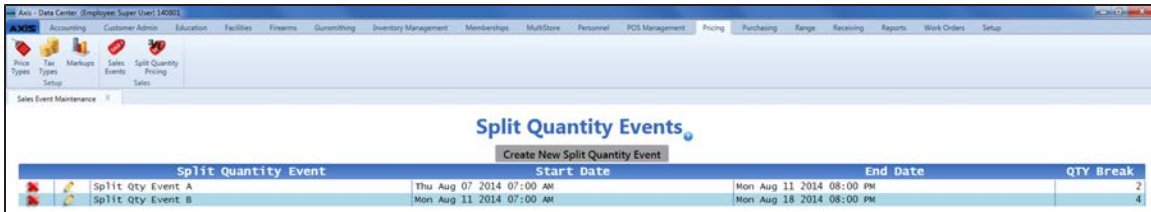
Manage Split Quantity Pricing Events

1. Navigate to the **Split Quantity Events** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Pricing > Split Quantity Pricing** from the main menu to display the **Split Quantity Events** screen.



2. Complete the following procedures as needed to manage split quantity pricing events:

Set Up a New Split Quantity Pricing Event

1. Click the **Create New Split Quantity Event** button to display the **Define/Edit Split Quantity Event** window.
2. Continue with the procedure below.

Edit a Split Quantity Pricing Event

1. Click an event's **Edit** button to display its **Define/Edit Split Quantity Event** window.
 2. Continue with the procedure below.
-

Add a Product to a Split Quantity Pricing Event

1. Click an event to display its **Split Quantity Event Products and Pricing** record.

The screenshot shows the 'Split Quantity Events' window. At the top, there is a header 'Split Quantity Events' with a sub-header 'Create New Split Quantity Event'. Below this, there is a table with columns: 'Split Qty Event A', 'START DATE', and 'END DATE'. The first row shows 'Split Qty Event A', 'Thu Aug 07 2014 07:00 AM', and 'Mon Aug 11 2014 09:00 PM'. Below the table, there is a section titled 'Split Qty Event Products and Pricing' with an 'Add Products' button. The main table has columns: 'UPC', 'ITEM #', 'Product Description', 'Active', 'Regular Price', and 'Sales Price'. The first row shows '60274811075', 'ITEM #', 'Primary Shooter (Rifle)', 'Active', '\$25.00', and '\$27.50'. The second row shows '60274811076', 'ITEM #', 'Preferred Customer', 'Active', '\$0.00', and '\$0.00'.

2. Click the **Add Products** button to display the **Product Search** window.

The screenshot shows the 'Product Search' window. It has a search bar at the top with the text 'Please select all that apply'. Below the search bar, there is a table with columns: 'UPC', 'Description', 'Qty', and 'Price'. The table contains several rows of product information, including 'Primary Shooter (Rifle)', 'Preferred Customer', 'Combat Master Belt Holster For Smith', 'LaserGrip Standard Polymer Kalfec P3', 'TRANSFER FEE', 'Gift Card', 'ADC SUPER THUMB II LDG TOOL', '9mm Luger 115 Grain Full Metal Jacke -1', 'Fiocchi 9x38mm Ultra 100 Grain Full F -5', 'Glock 17 Gen 4 9mm 17RD FS G4', 'M400 AR15 CARBINE, 16", 5.56, W30 1 4', and 'SILENCERCO 45 ACP OSPREY SUPPRE'. At the bottom of the window, there is an 'Adjustment' field with a value of '0', and buttons for 'Adjust Selection by Amount', 'Adjust Selection by Percentage', and 'Clear'.

3. Complete any of these procedures to limit the number of products shown:
 - Enter all or part of a product's description in the **Description** field.
 - Enter all or part of a product's UPC code number in the **UPC** field.
 - Click an **Attribute** button and one of its associated **Descriptor** buttons. (Repeat as needed to further restrict products with additional attributes and descriptors.)
 - Click the **Clear** button to remove all Attribute/Descriptor filters.
4. Complete any of these procedures to select the desired product(s):
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Click the **Select All** button to select all products.
 - Click the **Unselect All** button to deselect all products.
5. Complete one of these procedures as appropriate to add the selected product(s) and adjusted price(s) to the **Split Quantity Event Products and Pricing** record:
 - To adjust the price(s) by a dollar amount
 1. Enter the dollar amount in the **Adjustment** field. Be sure to include a minus sign (-) to reduce the price by that amount.
 2. Click the **Adjust Selection by Amount** button.

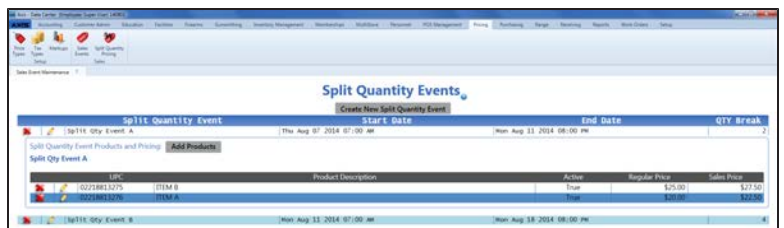
- To adjust the price(s) by a percentage,
 1. Enter the percentage as a decimal in the **Adjustment** field. Be sure to include a minus sign (-) to reduce the price by that percentage.
 2. Click the **Adjust Selection by Percentage** button.
- 6. If needed, edit a product's split quantity event price.

Note: Refer to [Edit Product's Split Quantity Pricing Event Price](#) for more information.

7. Double-click the **Split Quantity Event Products and Pricing** record to close it.
8. Click the tab's **Close** button to close the screen.

Remove a Product from a Split Quantity Pricing Event

1. Click an event to display its **Split Quantity Event Products and Pricing** record.



2. Click a product's **Delete** button to display a deletion confirmation window.
3. Click the **Yes** button to remove the product from the **Split Quantity Event Products and Pricing** screen.
4. Double-click the **Split Quantity Event Products and Pricing** record to close it.
5. Click the tab's **Close** button to close the screen.

Edit a Product's Split Quantity Pricing Event Price

1. Click an event to display its **Split Quantity Event Products and Pricing** record.
2. If needed, add one or more products to the split quantity event.

Note: Refer to [_](#) for more information.

3. Click a product's **Edit** button to display the **Edit Split Quantity Price** window.
4. Enter the new sale price in the **Sale Price** field.
5. Click the **Submit** button to display the new price in the product's **Sales Price** field.
6. Double-click the **Split Quantity Event Products and Pricing** record to close it.
7. Click the tab's **Close** button to close the screen.

Delete a Split Quantity Pricing Event

1. Click an event's **Delete** button to display a deletion confirmation window.
 2. Click the **Yes** button to remove the event from the **Split Quantity Events** screen.
 3. Click the tab's **Close** button to close the screen.
-
3. Enter/edit the split quantity event's name in the **Event Name** field.
 4. Enter/edit the event's start date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Start Date** field.
 5. Enter/edit the event's start time in the **Start Time** field.
 6. Enter/edit the event's end date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **End Date** field.
 7. Enter/edit the event's end time in the **End Time** field.
 8. Enter/edit the event's price break quantity in the **Price Break Quantity** field.
 9. Click the **Submit** button to display the new/updated event on the **Split Quantity Events** screen.
 10. Click the tab's **Close** button to close the screen.

Purchasing Administration

This section contains procedures to set up, maintain, and review vendors, vendor catalogs, purchase orders, and special order products.

Vendor Information

Vendor Information includes the vendor's name, addresses, phone numbers, email addresses, websites, contacts, FFL number, FTP information, and various identifiers.

- [Select a Vendor \(see page 336\)](#)
- [Set Up and Maintain a Vendor Record \(see page 338\)](#)
- [Set Up and Edit a Vendor Contact \(see page 341\)](#)
- [View and Update the Vendor List \(see page 344\)](#)
- [Import Vendor Data into the Vendor List \(see page 345\)](#)

Vendor Catalogs

Vendor Catalogs provide a list of the products available for purchase from a specific vendor.

- [View, Update, and Add Products from a Vendor Catalog \(see page 346\)](#)

Purchase Order Features

Purchase Order Features provide procedures for manually ordering products, tracking unfulfilled orders, and streamlining the Receiving process.

- [Create a Purchase Order \(see page 349\)](#)
- [Import Purchase Order Data \(see page 351\)](#)
- [Create a Vendor Purchase Order \(see page 353\)](#)
- [Update a Pending Purchase Order \(see page 355\)](#)

Special Order Features

Special Order Features allow special orders to be reviewed, edited, printed, and assigned to purchase orders.

- [View and Update Special Orders \(see page 359\)](#)

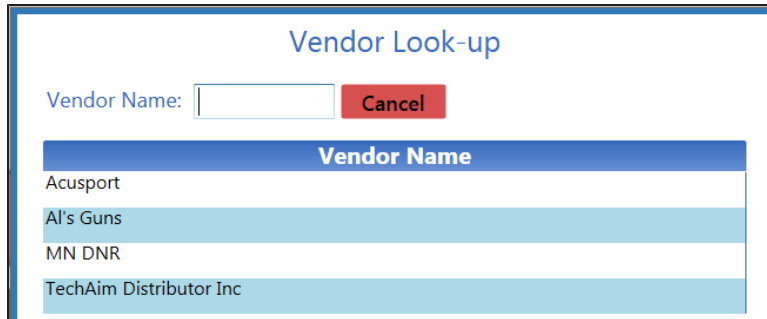
Select a Vendor

Note: This procedure selects an **existing** vendor from the vendor database for review and maintenance of the vendor's record. To add a new vendor to the database, refer to [Set Up and Maintain a Vendor Record \(see page 338\)](#).

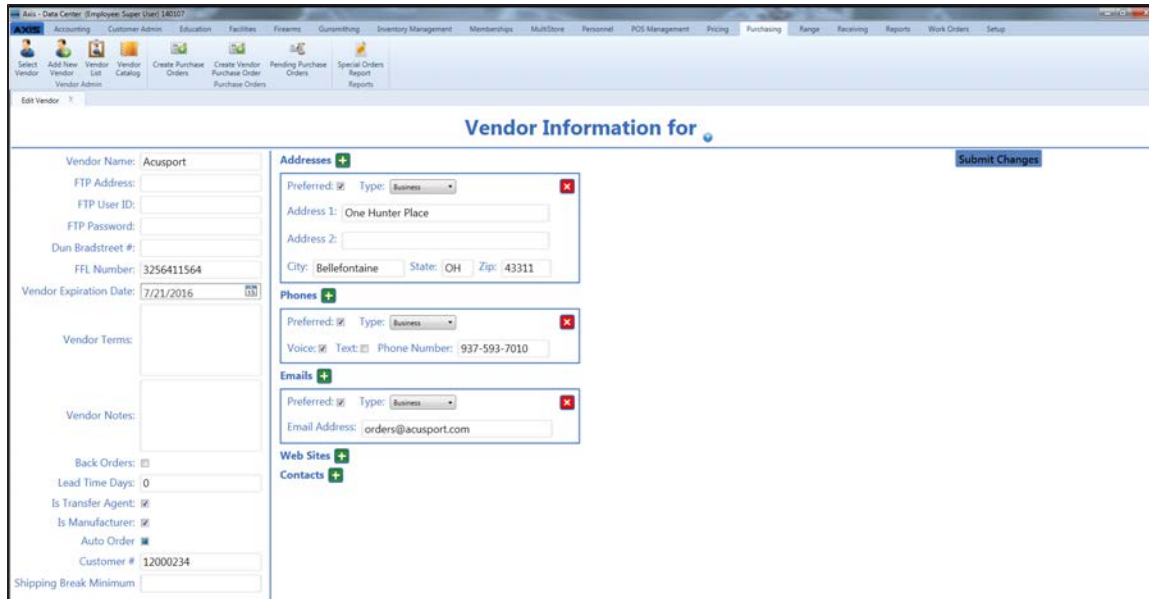
1. Navigate to the **Vendor Look-up** window.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Select Vendor** from the main menu to display the **Vendor Look-up** window.

A screenshot of the 'Vendor Look-up' window. At the top, it says 'Vendor Look-up'. Below that is a search field labeled 'Vendor Name:' with a 'Cancel' button to its right. Below the search field is a table with a blue header 'Vendor Name'. The table contains four rows of vendor names: 'Acusport', 'Al's Guns', 'MN DNR', and 'TechAim Distributor Inc'.

2. If needed, enter all or part of the vendor's name in the **Name** field and press the **Enter** key to display all matching results.
3. Double-click a name to display the vendor's **Vendor Information for** screen.

A screenshot of the 'Vendor Information for' screen for the vendor 'Acusport'. The screen is divided into several sections. On the left, there are fields for 'Vendor Name: Acusport', 'FTP Address', 'FTP User ID', 'FTP Password', 'Dun Bradstreet #', 'FPL Number: 3256411564', 'Vendor Expiration Date: 7/21/2016', 'Vendor Terms', and 'Vendor Notes'. Below these are checkboxes for 'Back Orders', 'Lead Time Days: 0', 'Is Transfer Agent', 'Is Manufacturer', 'Auto Order', and 'Customer # 12000234'. On the right, there are sections for 'Addresses', 'Phones', 'Emails', 'Web Sites', and 'Contacts'. The 'Addresses' section shows 'Preferred: [checked] Type: Business' and 'Address 1: One Hunter Place', 'Address 2:', 'City: Bellefontaine State: OH Zip: 43311'. The 'Phones' section shows 'Preferred: [checked] Type: Business' and 'Voice: [checked] Text: [unchecked] Phone Number: 937-593-7010'. The 'Emails' section shows 'Preferred: [checked] Type: Business' and 'Email Address: orders@acusport.com'. A 'Submit Changes' button is located at the top right of the form.

4. Complete the following procedure to edit the vendor record as needed:

1. Enter/edit Vendor information on the screen.

Note: Refer to [Set Up and Maintain a Vendor Record \(see page 338\)](#) for more information.

2. Click the **Submit Changes** button to display a save confirmation window.
3. Click the **Close** button to close the confirmation window.
5. Click the tab's **Close** button to close the screen.

Set Up and Maintain a Vendor Record

1. Complete the following procedures as appropriate to maintain vendor records on the **Vendor Information for** screen.

Add a Vendor Record



1. Select **Purchasing > Add New Vendor** from the main menu to display a blank **Vendor Information for** screen.
2. Continue with the procedure below.

Edit a Vendor Record

1. [Select a Vendor \(see page 336\)](#).
2. Continue with the procedure below.

2. Enter/edit Vendor information on the screen.

Note: Required fields and settings are displayed with red borders.

Vendor Name	Enter the vendor's name.
FTP Address	Enter the vendor's FTP address.
FTP User ID	Enter the vendor's FTP user name.
FTP Password	Enter the vendor's FTP password.
Dun Bradstreet #	Enter the vendor's Dun Bradstreet number.
FFL Number	Enter the vendor's FFL number.
Vendor Expiration Date	Enter the vendor's expiration date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Vendor Terms	Enter the vendor's terms.
Vendor Notes	Enter notes about the vendor.
Back Orders	If the vendor accepts back orders, check the checkbox.
Lead Time Days	Enter the number of days needed to process an order before shipping.
Is Transfer Agent	If the vendor is a transfer agent, check the checkbox.
Is Manufacturer	If the vendor is a manufacturer, check the checkbox.
Auto Order	If auto order is active for the vendor, check the checkbox.

Customer #	Enter the vendor's customer number.	
Shipping Break Minimum	Enter the vendor's shipping break minimum.	
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.	
	Preferred	If this address record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
Phones	If a phone record is not needed, click its Close (red X) button to close it. If an additional phone record is needed, click the Add (green +) button to open it.	
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails	If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.	
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.
Web Sites	If a website record is not needed, click its Close (red X) button to close it. If an additional website record is needed, click the Add (green +) button to open it.	
	Preferred	If this website record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	URL Address	Enter the website's URL address.

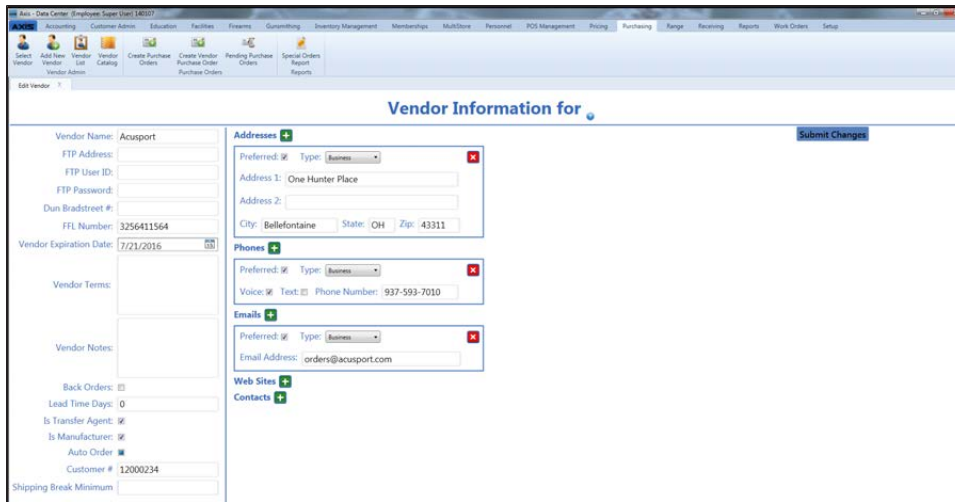
Contacts	<p>If a contact record is not needed, click its Close (red X) button to delete it.</p> <p>If an additional contact record is needed, click the Add (green +) button to open a blank Contact Information window.</p> <p>To view or edit an existing contact record, click the record's View button to display the contact's Contact Information window.</p> <p>Note: Refer to Set Up and Edit a Vendor Contact (see page 341) for more information.</p>
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3. Click the **Submit Changes** button to display a save confirmation window.
4. Click the **Close** button to close the confirmation window.
5. Click the tab's **Close** button to close the screen.

Set Up and Edit a Vendor Contact

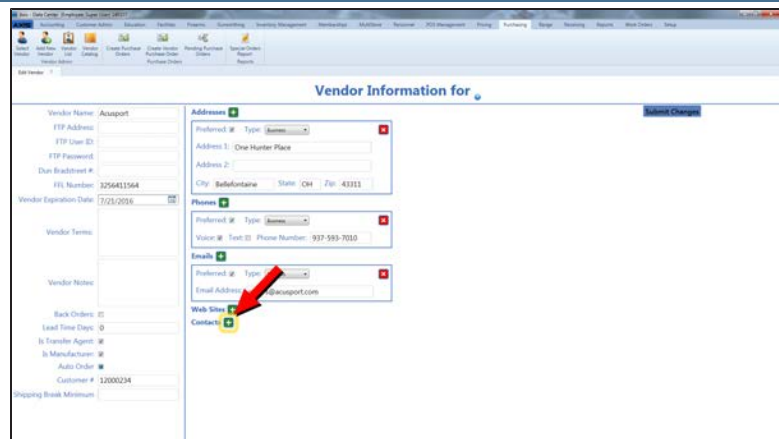
1. Navigate to the desired vendor's **Vendor Information** for screen.

Note: Refer to [Set Up and Maintain a Vendor Record](#) (see page 338) for more information.



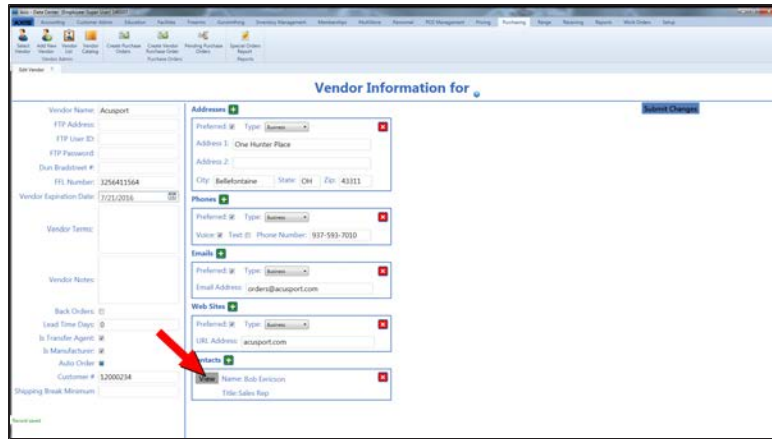
2. Complete the following procedures as needed to manage vendor contacts:

Add a Contact



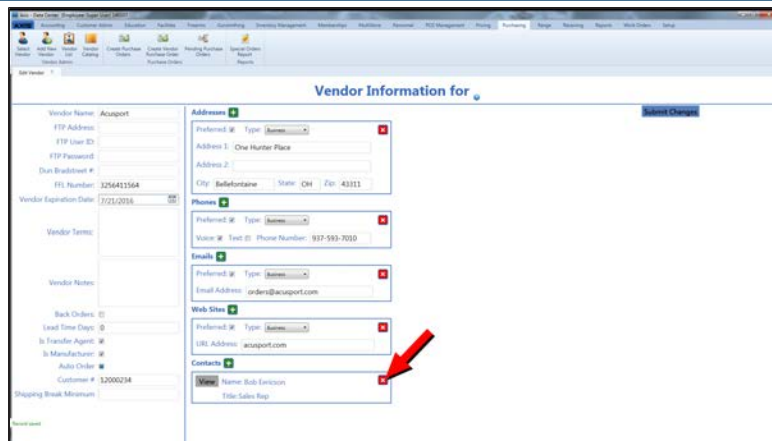
1. Click the **Add** (green +) button beside the **Contacts** heading to display the **Contact Information** window.
2. Continue with the procedure below.

Edit a Contact



1. Click a contact's **View** button to display the contact's **Contact Information** window.
2. Continue with the procedure below.

Delete a Contact



1. Click a contact's **Close** (red **X**) button to delete it from the **Vendor Information** for screen.
2. Click the **Submit Changes** button to display a save confirmation window.
3. Click the **Close** button to close the confirmation window.
4. Click the tab's **Close** button to close the screen.

3. Enter/edit Vendor Contact information in the window.

Note: Required fields and settings are displayed with red borders.

First	Enter the contact's first name.
Last	Enter the contact's last name.
Title	Enter the contact's title.
Addresses	If an address record is not needed, click its Close (red X) button to close it. If an additional address record is needed, click the Add (green +) button to open it.
	Preferred If this address record is the preferred method of contact, check the checkbox.

	Type	Select the appropriate value from the drop-down menu.
	Address 1	Enter the first line of the street address.
	Address 2	Enter the second line of the street address (if applicable).
	City	Enter the city.
	State	Enter the two-letter abbreviation for the state.
	Zip	Enter the ZIP code.
Phones		If a phone record is not needed, click its Close (red X) button to close it. If an additional phone record is needed, click the Add (green +) button to open it.
	Preferred	If this phone record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Voice	If this phone number can receive voice calls, check the checkbox.
	Text	If this phone number can receive text messages, check the checkbox.
	Phone Number	Enter the entire (xxx-xxx-xxxx) phone number.
Emails		If an email record is not needed, click its Close (red X) button to close it. If an additional email record is needed, click the Add (green +) button to open it.
	Preferred	If this email record is the preferred method of contact, check the checkbox.
	Type	Select the appropriate value from the drop-down menu.
	Email Address	Enter the entire email address.

4. Click the **Save** button to close the window and display the contact information on the **Vendor Information for** screen.
5. Click the **Submit Changes** button to display a save confirmation window.
6. Click the **Close** button to close the confirmation window.
7. Click the tab's **Close** button to close the screen.

View and Update the Vendor List

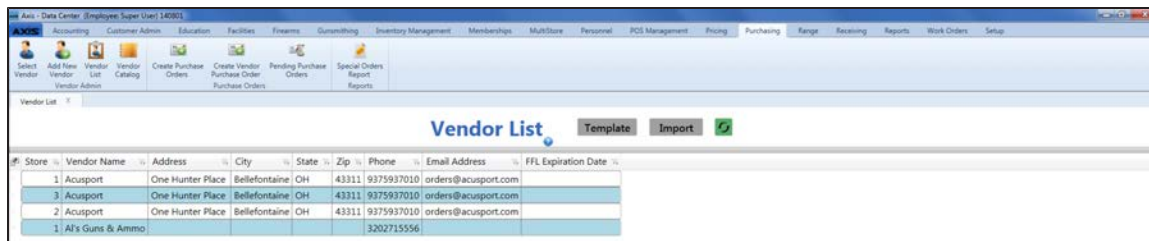
1. Navigate to the **Vendor List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Vendor List** from the main menu to display the **Vendor List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed:

View a List of Vendor Contacts

1. Click a vendor to display the vendor's **Vendor Contacts** window.



2. Click the **OK** button to close the window.

Import Vendor Data

Refer to [Import Vendor Data into the Vendor List \(see page 345\)](#) for more information.

3. Click the tab's **Close** button to close the screen.

Import Vendor Data into the Vendor List

Complete the following procedure to import vendor data into the **Vendor List** screen by creating, populating, and importing a formatted Excel file.

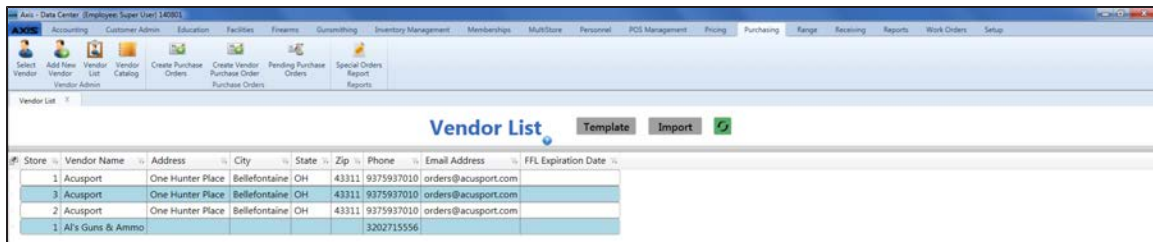
1. Navigate to the **Vendor List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Vendor List** from the main menu to display the **Vendor List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the **Template** button to export the template format to an Excel file.
3. Populate the Excel file with vendor information.
4. Save the Excel file.
5. Click the **Import** button on the **Vendor List** screen to display the **Load Excel Import** window.
6. Browse to the desired location.
7. If the system detects any errors, it displays the **Import Complete with Errors** window.

Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
8. When the import is complete, the system displays the **Upload Complete** window.
 9. Click the **Close** button to close the window.
 10. Click the tab's **Close** button to close the screen.

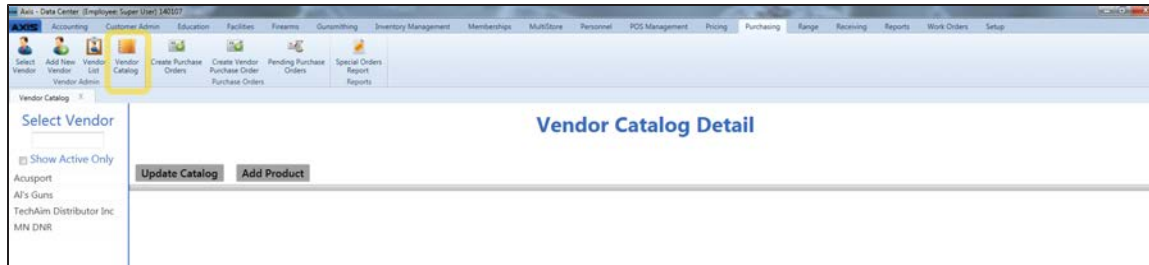
View, Update, and Add Products from a Vendor Catalog

1. Navigate to the **Vendor Catalog Detail** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



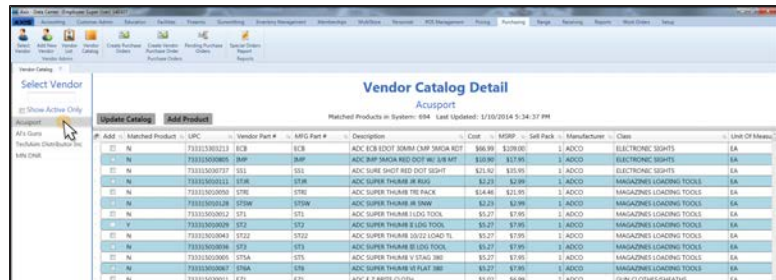
2. Select **Purchasing > Vendor Catalog** from the main menu to display the **Vendor Catalog Detail** screen.



2. Complete the following procedures as appropriate to maintain vendor catalogs.

View/Update the Acusport Catalog

1. Click **Acusport** in the **Select Vendor** list to display the Acusport catalog on the **Vendor Catalog Detail** screen.



2. If needed, click the **Update Catalog** button to refresh the screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

View/Update a Non-AcuSport Vendor Catalog

- Complete these procedures as needed to restrict the vendors displayed in the **Select Vendor** list:
 - Check the **Show Active Only** checkbox to show only active vendors in the list.
 - Enter all or part of a vendor's name in the field to show only matching vendors.
- Click a vendor name in the **Select Vendor** list to display that vendor on the **Vendor Catalog Detail** screen.



- Click the **Update Catalog** button to display an **Open** window.
- Browse to the desired location and double-click the appropriate file (.xlsx format) containing the vendor catalog to upload it.

Note: The vendor catalog file must be a formatted Excel spreadsheet (.xlsx format) containing 15 columns named and arranged (left-to-right) in the order shown below:

Vendor Part #	The vendor part number
MFG Part #	The manufacturer's part number
Receipt Description	A short (32 characters or less) description that will print on the register receipt
Item Description	A long (80 characters or less) description of the item used at the register
Size	Size
Color	Color
UoM	Unit of measure
Catalog Pg	Catalog page number
Class	Class (Item attribute descriptor)
Mfg	Manufacturer
UPC	The UPC code number with check digit included
Cost	Cost
Retail	Retail price
Weight	Weight
Sell Pack	Sell pack

- If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
- Complete the following procedure as appropriate to add catalog products to the product database.

Add a Vendor Catalog Product to the Product Database

1. Check a product's **Add** checkbox to select it. (Repeat as needed to select additional products.)
2. Click the **Add Product** button to add the selected product(s) to the **Product Maintenance** screen.

Note: To display the **Product Maintenance** screen, click the **Inventory Management** tab. Then click the **Product Maintenance** button.

4. Click the tab's **Close** button to close the screen.

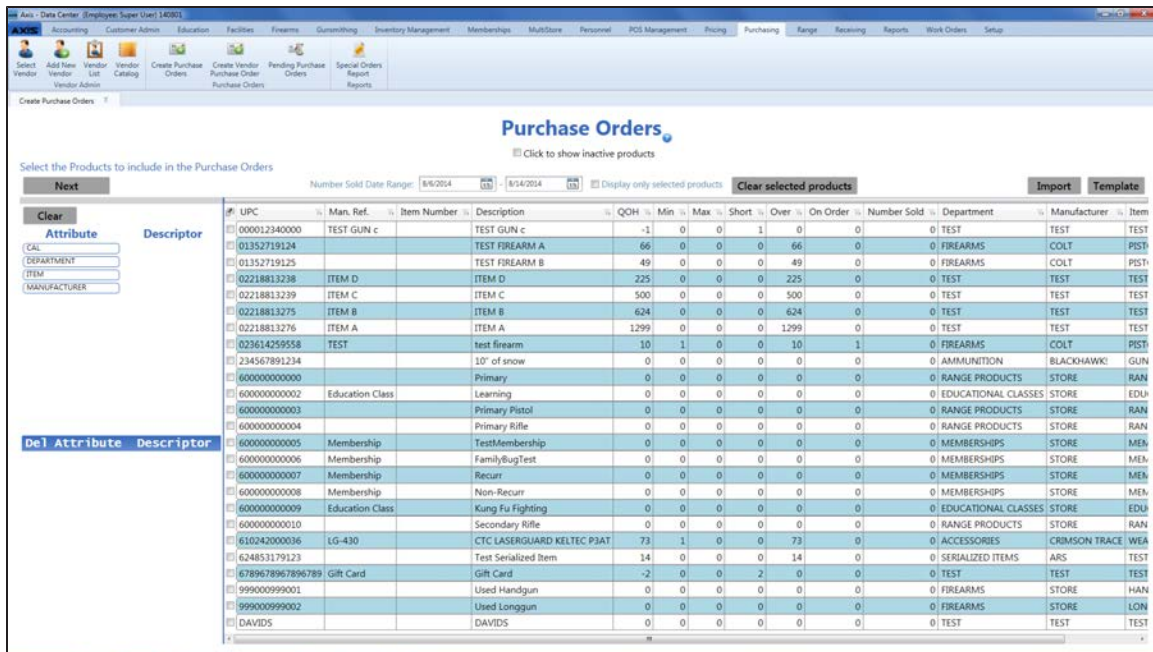
Create a Purchase Order

1. Navigate to the **Purchase Orders** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Create Purchase Orders** from the main menu to display the **Purchase Orders** screen.



2. Use onscreen controls as needed to restrict and sort the products displayed on the screen:

- Check the **Click to show inactive products** checkbox to display both active and inactive products.
- Uncheck the **Click to show inactive products** checkbox to display only active products.
- Click an **Attribute** button and one of its associated **Descriptor** buttons to display only products with matching attribute/descriptor pairs. (Repeat as needed to further restrict the products displayed with additional attribute/descriptor pairs.)
- Click the **Delete** button beside an attribute/descriptor pair to remove it as a restriction on displayed products.
- Click the **Clear** button to remove all attribute/descriptor pairs to remove them as restrictions on displayed products.
- Enter starting and ending dates in the **Number Sold Date Range** fields and press the **Enter** key to display only sales results from a specific time frame.
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Check a product's checkbox to select it. (Repeat steps as needed to display and select additional products. Click the **Clear selected products** button to deselect all products.)

4. If desired, check the **Display only selected products** checkbox to display only selected items on the screen.

5. Click the **Next** button to display the **Purchase Orders (Enter the Quantity, Price, and Vendor)** screen.
6. Select the desired vendor from a product's **Order From Vendor** drop-down field. (Selecting a vendor for one product will autoselect that vendor for all products. Select a different vendor for other products as needed.)
7. Enter a quantity for each product in its **Quantity** field.
8. Enter/edit the cost for each product in its **Cost** field as needed.
9. If needed, click a product's **Delete** button to remove it from the list.
10. Click the **Next** button to display the **Purchase Orders (Process Purchase Orders)** screen.
11. Continue working with the purchase order as appropriate.

Note: Refer to [Update a Pending Purchase Order \(see page 355\)](#) for more information.

12. Click the tab's **Close** button to close the screen.

Import Purchase Order Data

Complete the following procedure to import purchase order data into the **Purchase Orders** screen by creating, populating, and importing a formatted Excel file.

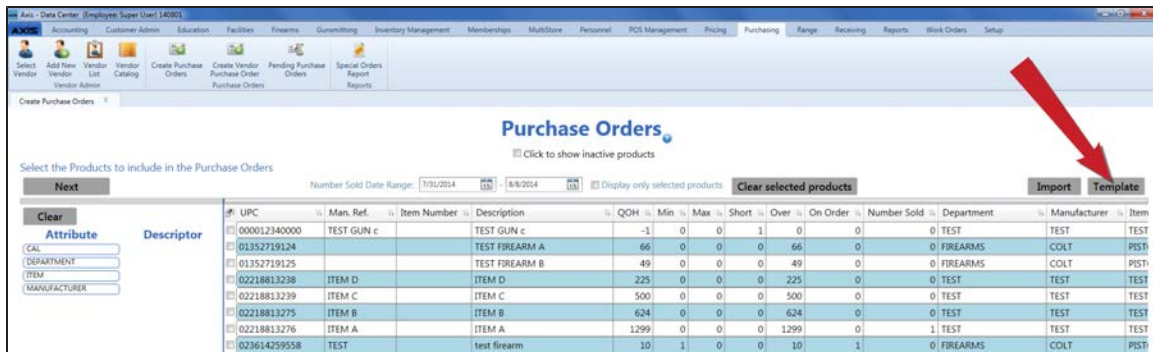
1. Navigate to the **Purchase Orders** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

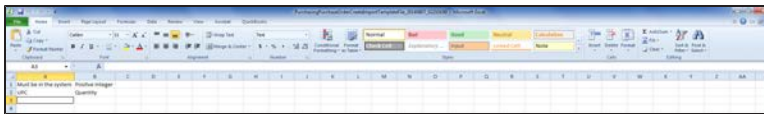


2. Select **Purchasing > Create Purchase Orders** from the main menu to display the **Purchase Orders** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Click the **Template** button to export the template format to an Excel file.

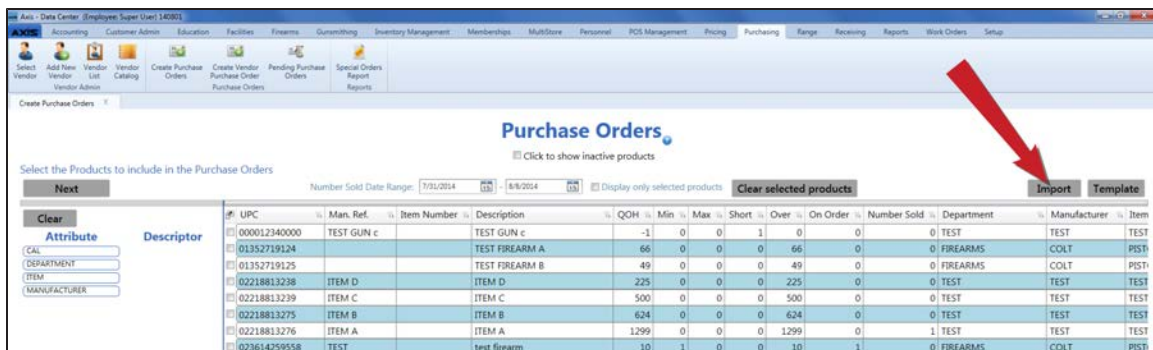


3. Populate the Excel file with purchase order information.

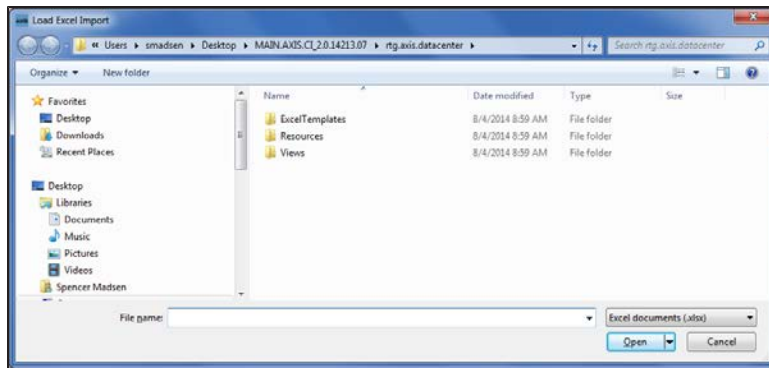
Note: The file must adhere to the validation requirements indicated in row 1 and below:

- **UPC** and **Quantity** are required fields.

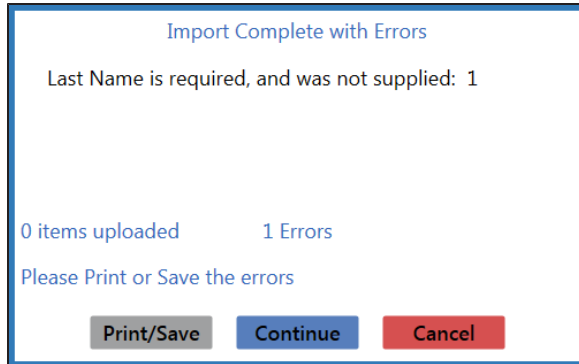
4. Save the Excel file.



5. Click the **Import** button on the **Purchase Orders** screen to display the **Load Excel Import** window.

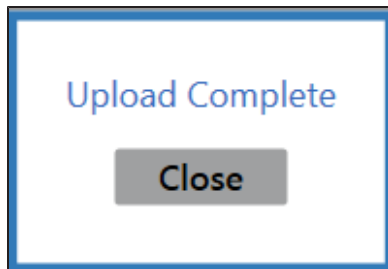


6. Browse to the desired location.
7. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
8. When the import is complete, the system displays the **Upload Complete** window.



9. Click the **Close** button to close the window.
10. Click the tab's **Close** button to close the screen.

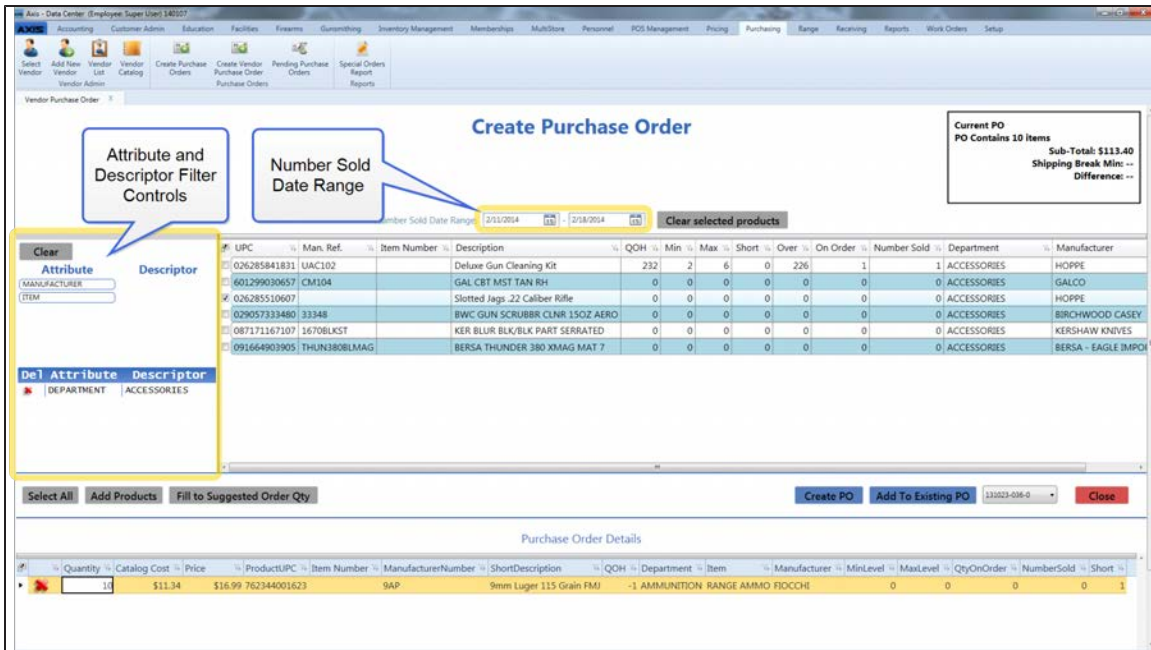
Create a Vendor Purchase Order

1. Navigate to the **Create Purchase Order** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Create Vendor Purchase Order** from the main menu to display the **Create Purchase Order** screen and the **Vendor Look-up** window.
3. If needed, enter all or part of the vendor's name in the **Name** field and press the **Enter** key to display all matching results.
4. Double-click a name to select the vendor and close the **Vendor Look-up** window.



2. Use onscreen controls as needed to restrict and sort the products displayed on the screen:

- Click an **Attribute** button and one of its associated **Descriptor** buttons to display only products with matching attribute/descriptor pairs. (Repeat as needed to further restrict the products displayed with additional attribute/descriptor pairs.)
- Click the **Delete** button beside an attribute/descriptor pair to remove it as a restriction on displayed products.
- Click the **Clear** button to remove all attribute/descriptor pairs to remove them as restrictions on displayed products.
- Enter starting and ending dates in the **Number Sold Date Range** fields and press the **Enter** key to display only sales results from a specific time frame.
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Select the desired product(s):

- Check a product's checkbox to select it. (Repeat as needed to select additional products.)
- Uncheck a product's checkbox to deselect it.
- Click the **Select All** button to select all products on the screen.
- Click the **Clear Selected Products** button to deselect all products.

4. Click the **Add Products** button to add the selected product(s) to the **Purchase Order Details** section.
5. Complete the following procedures as needed to enter a quantity for each product:
 - Enter a quantity in a product's **Quantity** field.
 - Click the **Fill to Suggested Order Qty** button to display a confirmation screen. Click the **Yes** button to close the screen and automatically populate the **Quantity** field(s).

Note: The system calculates the suggested order quantity for a product by subtracting its **QOH** from its **Max Level**. If the product's **QOH** is greater than its **Min Level**, the system does not calculate a suggested order quantity for the product.

6. Complete the following procedures as needed to assign the selected product(s) to a purchase order:

Create a New Purchase Order

Click the **Create PO** button to display the **Purchase Orders (Process Purchase Orders)** screen.

Amend an Existing Purchase Order

1. Select the desired existing purchase order from the drop-down field.
2. Click the **Add to Existing PO** button to display the **Purchase Orders (Process Purchase Orders)** screen.

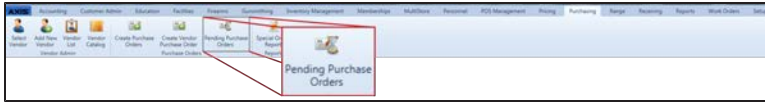
7. Continue working with the purchase order as appropriate.

Note: Refer to [Update a Pending Purchase Order \(see page 355\)](#) for more information.

8. Click the tab's **Close** button to close the screen.

Update a Pending Purchase Order

1. Navigate to the **Purchase Orders** (pending) screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Pending Purchase Orders** from the main menu to display the **Purchase Orders (Process Purchase Orders)** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed to manage pending purchase orders:

Edit a Pending Purchase Order

1. Click a purchase order's **Edit** button to display the **Edit Purchase Order** window.
2. Edit Purchase Order information in the window as needed.

Vendor	Select the vendor from the drop-down.
Ship To Store	Select the store from the drop-down.
PO Terms	Enter terms as needed.
Cancellation Date	Enter the cancellation date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Ship Date	Note the autofilled ship date. If needed, enter a new ship date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Ship Via	Enter the shipping method.
Shipping Account	Enter the shipping account number.

3. Click the **Finished** button to close the **Edit Purchase Order** window.

Add a Product

1. Click a purchase order's **Edit** button to display the **Edit Purchase Order** window.
 2. Click the **Add Product** button to display the **Product Search** screen.
 3. [Select a Single Product \(see page 27\)](#) to add it to the purchase order. (Repeat steps as needed to add additional products to the purchase order.)
 4. Click the **Finished** button to close the **Edit Purchase Order** window.
-

Edit a Product

1. Click a purchase order's **Edit** button to display the **Edit Purchase Order** window.
 2. Complete the following procedures as needed:
 - Edit a product's quantity in its **Quantity** field.
 - Edit a product's cost in its **Cost** field.
 3. Click the **Finished** button to close the **Edit Purchase Order** window.
-

Remove a Product

1. Click a purchase order's **Edit** button to display the **Edit Purchase Order** window.
 2. Click a product's **Delete** button to remove it from the purchase order.
 3. Click the **Finished** button to close the **Edit Purchase Order** window.
-

Delete a Purchase Order

Click a purchase order's **Delete** button to remove it from the **Purchase Orders (Process Purchase Orders)** screen.

Process a Purchase Order

1. Click a purchase order's **Process** button to display the **Purchase Order Preview** window.

2. Edit Purchase Order Preview information in the window as needed.

Ship To Store	Select the appropriate store from the drop-down field.
PO Terms	Enter terms as needed.
Cancellation Date	Enter the cancellation date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Ship Date	Enter the ship date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Ship Via	Enter the shipping method.
Shipping Account	Enter the shipping account number.
Email Address	Select the desired vendor email address from the drop-down field.
Exclude Ordered Quantity	Check the checkbox to prevent the system from considering the ordered item(s) when performing Min/Max calculations for Auto Order numbers or suggested quantities for purchase orders.
Bill To Name	Enter/edit the store name as needed.
Bill To Address 1	Enter/edit the first line of the street address as needed.
Bill To Address 2	Enter/edit the second line of the street address as needed.
Bill To City	Enter/edit the city as needed.

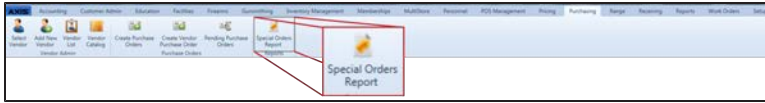
Bill To State	Enter/edit the two-letter abbreviation for the state as needed.
Bill To Zip	Enter/edit the ZIP code as needed.
Bill To Country	Enter/edit the country as needed.

3. Click the **Refresh Preview** button to update the preview at the bottom of the window.
4. Review, print, and/or export the purchase order as needed.
5. Complete one of the following procedures as appropriate to process the purchase order for receiving:
6.
 - To email a PDF of the completed purchase order to the selected **Email Address**, click the **Submit** button.
 - To print a hardcopy of the purchase order,
 1. Click the **Print Report** button to display a **Print** window.
 2. Click the **Print** button to print the document and close the window.
 3. Click the **Mark as Sent** button.
 - To export an electronic version of the purchase order,
 1. Select a format from the drop-down field.
 2. Click the **Export** button to display a **Save As** window.
 3. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the purchase order.
 4. Click the **Mark as Sent** button.

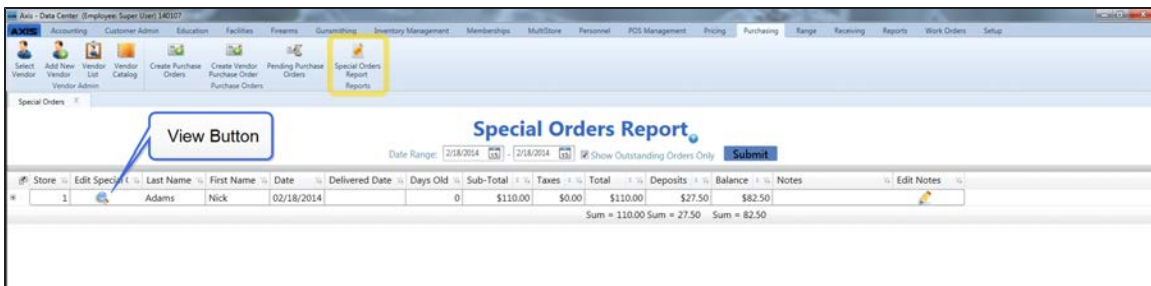
-
3. Click the tab's **Close** button to close the screen.

View and Update Special Orders

1. Navigate to the **Special Orders Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Purchasing > Special Orders Report** from the main menu to display the **Special Orders Report** screen.
3. Complete the following procedure to display a selection of special orders on the **Special Orders Report** screen:
 1. Enter starting and ending dates in the **Date Range** fields to display special orders from that time frame.
 2. If needed, check the **Show Outstanding Orders Only** checkbox to display only special orders that have not been fulfilled.
 3. Click the **Submit** button.
4. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed to manage special orders:

Edit a Special Order's Notes

1. Click a special order's **Edit Notes** button to display the **Edit the special order note** window.
2. Edit the text in the field.
3. Click the **OK** button to close the window.

View a Special Order's Component Record



1. Click the special order's **Expand (+)** button to display its component record.
2. Click the special order's **Contract (-)** button to close its component record.

View a Special Order's Details

1. Click a special order's **View** button to display the **Special Order Request** window.

The screenshot shows the 'Special Order Request' window. At the top, it displays customer information: Customer Name: Nick Adams, Phone Number: (218) 681-2215, Special Order #: 20035, and Employee Name: Super User. Below this is a 'Scan or Enter UPC' field and buttons for 'Add New Product' and 'Product Search'. A table lists items with columns for '#', 'Remove', 'UPC', 'Description', 'Reg. Price', 'MFG Part #', 'Sales Price', 'On Order QTY', 'Purchase Order', and 'Vendor'. One item is listed: 08737167107, KEH BLUR BLK/BLK PART SE, \$110.00, 1670BLKST, \$110.00, 0, 00228-047-0, Acusport. Below the table are 'Notes' and 'Special Order Information' sections. The 'Special Order Information' section includes: Payments: \$27.50, Balance Due: \$82.50, Special Order Date: 02/18/2014, Order Placed: 02/18/2014, Received, and Picked Up. At the bottom are buttons for 'Print SO', 'Create New PO', and 'Close'.

2. Click the **Close** button to close the window.

Add a Product

1. Click a special order's **View** button to display the **Special Order Request** window.

This screenshot is identical to the one above, showing the 'Special Order Request' window with the same customer information, item table, and special order details.

2. Complete one of these procedures to add a product to the special order:

- Scan a UPC in the **Scan or Enter UPC** field.
- Enter a UPC in the **Scan or Enter UPC** field and press the **Enter** key
- Click the **Product Search** button to display the **Product Search** screen.

Note: Refer to [Select One or More Products \(see page 28\)](#) for more information.

- Click the **Add New Product** button to display a blank **Product Edit** window.

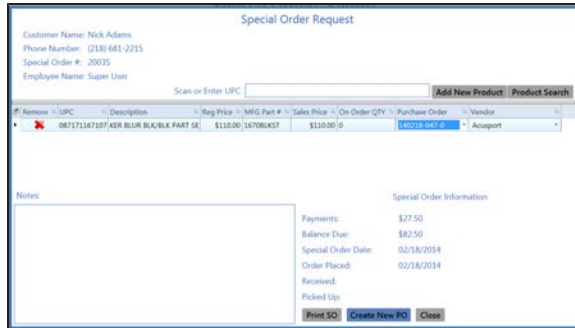
Note: Refer to [Manage Product Information \(see page 149\)](#) for more information.

3. Complete the appropriate procedure to assign the product to a purchase order.

Note: Refer to [Create a New Purchase Order for a Special Order Product](#) and/or [Amend an Existing Purchase Order for a Special Order Product](#) for more information.

Remove a Product

1. Click a special order's **View** button to display the **Special Order Request** window.



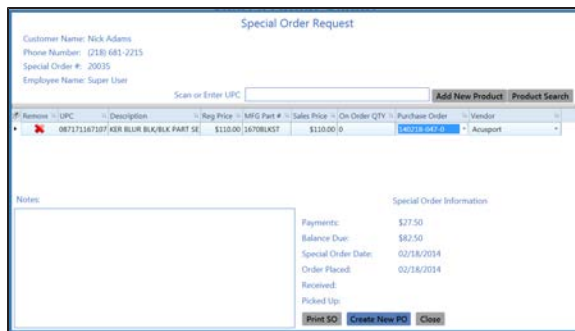
2. Click a product's **Remove** button.

Note: The **Special Order Request** window continues to display the product until the window is closed and reopened.

3. Click the **Close** button to close the window.

Create a New Purchase Order for a Special Order Product

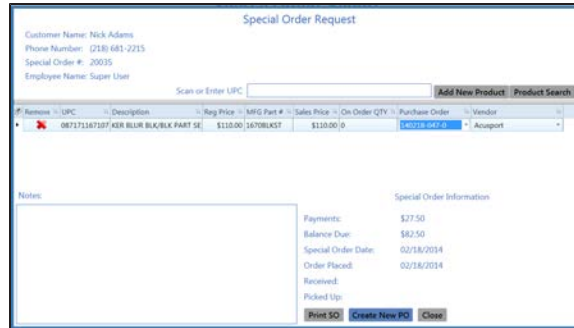
1. Click a special order's **View** button to display the **Special Order Request** window.



2. If a product has not been assigned a vendor, select a vendor from the product's **Vendor** drop-down field.
 3. Click the **Create New PO** button to automatically add the generated purchase order(s) to the appropriate **Purchase Order** drop-down field(s).
 4. Click the **Close** button to close the window.
-

Amend an Existing Purchase Order for a Special Order Product

1. Click a special order's **View** button to display the **Special Order Request** window.



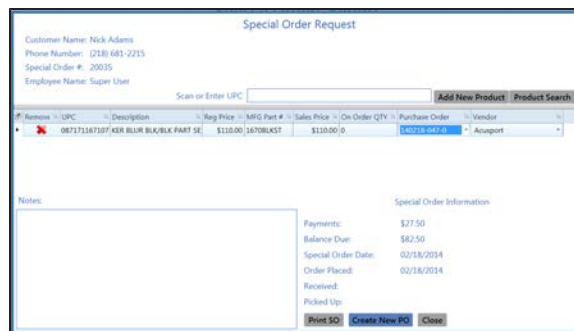
2. Select a purchase order from the product's **Purchase Order** drop-down field.

Note: If the **Purchase Order** drop-down field does not contain any purchase orders, the product may require a new purchase order. Refer to [Create a New Purchase Order for a Special Order Product](#) for more information.

3. Press the **Enter** key to automatically add the vendor associated with the selected purchase order to the product's **Vendor** drop-down field.
4. Click the **Close** button to close the window.

Print a Special Order

1. Click a special order's **View** button to display the **Special Order Request** window.



2. Click the **Print SO** button to display the special order document.
3. Review the document and make changes as needed.
4. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy records of the special order.
5. Click the **Close** button to close the window.

3. Click the tab's **Close** button to close the screen.

Receiving Administration

This section contains procedures to receive products, create invoices, return items to vendors, view records of received items, and manage case quantities.

Case Quantity Values

A Case Quantity Value allows a product to be received and sold by the case (or other package containing multiples of the product) while retaining inventory costs and numbers (QOH) at the single unit level.

- [Manage Case Quantities \(see page 383\)](#)

Receiving Inventory

Inventory items may be received by purchase order or packing slip. Both methods allow for adjustments to an incoming item's ordered quantity, received quantity, cost, retail price, gross profit percentage, and vendor product details. The receiving process directly impacts inventory levels and provides an opportunity to print product labels.

- [Receive Inventory Items \(see page 364\)](#)
- [Import Purchase Order Data \(see page 371\)](#)
- [Complete the Vendor Product Detail Window \(see page 373\)](#)
- [Complete the Label Printing Window \(see page 375\)](#)

Invoicing

Invoices are created through the receiving process. When an invoice is being processed, adjustments may be made to an invoice item's invoiced quantity, cost, retail price, and gross profit percentage. The invoicing process directly impacts calculated costs and accounting values.

- [Manage Invoices \(see page 378\)](#)

Vendor Returns

Vendor Returns may be documented for accounting purposes with a Return Merchandise Authorization (RMA).

- [Manage Vendor Returns \(see page 389\)](#)

Receiving History

The Receiving History records provide an overview of all receiving records, invoices, and individual items received during a selected time frame.

- [View and Use the Receiving History Record \(see page 385\)](#)
- [View the Receiving History By Item Record \(see page 388\)](#)

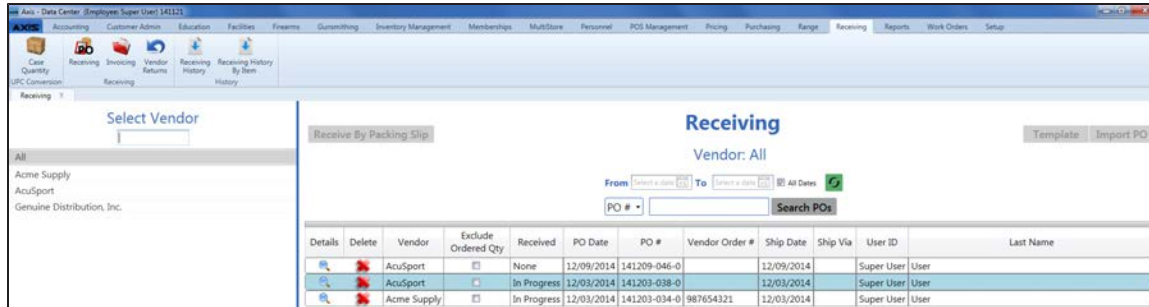
Receive Inventory Items

1. Navigate to the **Receiving** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Receiving** from the main menu to display the **Receiving** screen.



2. Complete any of the following procedures as desired to determine which purchase orders are displayed on the screen:

- **Filter by Vendor:**

Click a vendor name in the **Select Vendor** list to display only purchase orders for that vendor. (Click the **All** vendor name to display purchase orders for all vendors.)

Note: If needed, enter all or part of a vendor's name in the field to show only matching vendors in the **Select Vendor** list.

- **Filter by Date:**

Uncheck the **All Dates** checkbox, enter dates in the **From** and **To** fields, and click the **Refresh** button to display only purchase orders from that date range.

- **Filter by Significant Number:**

Select an option (**PO#**, **Scan UPC**, **Scan MFG #**, **Scan Item #**, **Scan Vendor Part #**) from the drop-down, enter all or part of the desired identifier in the text field, and click the **Search POs** button to display only purchase orders that contain the entered text.

- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Complete the following procedures as needed to manage received products:

Receive Items with a Purchase Order

1. Click a purchase order's **Details** button to display the **Receiving Details** screen.
 2. Continue with the procedure below.
-

Receive Items with a Packing Slip

1. Click the appropriate vendor name in the **Select Vendor** list to activate the **Receive By Packing Slip** button.
2. Click the **Receive By Packing Slip** button to display the **Receiving Details** screen.

Note: From this point forward, the receiving record for the packing slip will be considered a purchase order.

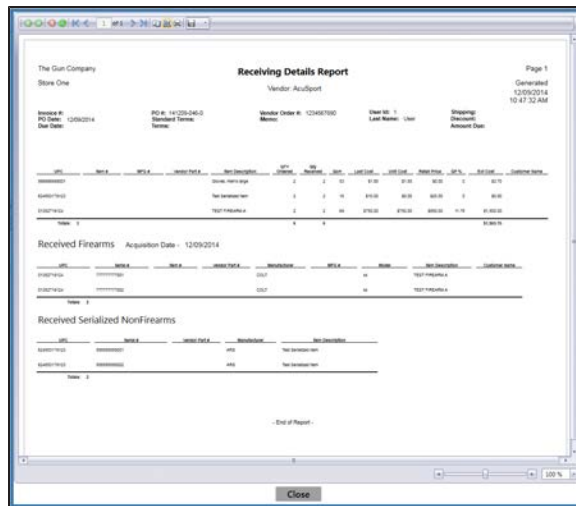
3. Continue with the procedure below.

Import Purchase Order Data

Refer to [Import Purchase Order Data \(see page 371\)](#) for more information.

Print a Receiving Details Report

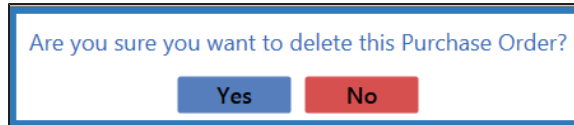
1. Click a purchase order's **Details** button to display the **Receiving Details** screen.
2. Receive items as desired.
3. Click the **Print Receiving** button to display the **Receiving Details Report** window.



4. Adjust display as desired.
 5. Click the **Print report** button to display the **Print** window.
 6. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
 7. Click the **Print** button to print the document.
 8. Click the **Close** button on the **Receiving Details Report** window to close it.
-

Delete a Purchase Order

1. Click a purchase order's **Delete** button to display a deletion confirmation window.



2. Click the **Yes** button to remove the purchase order from the screen.
3. Click the tab's **Close** button to close the screen.

gr	Delete	Serial #	Edit	UPC	Item #	MFG #	Vendor Part #	Item Description	Qty Ordered	Qty Received	QOH	Last Cost	Unit Cost	Retail Price	GP %	Ext Cost	Customer Name
				99999999001				Gloves, men's large	2	0	53	\$1.85	\$1.85	\$0.00	0%	\$0.00	N/A
				024853179123				TEST Serialized Item	3	0	18	\$10.00	\$10.00	\$20.00	50.0%	\$0.00	N/A
				01352719124				TEST FIREARM A	2	0	69	\$750.00	\$750.00	\$850.00	11.78%	\$0.00	N/A
Totals									6	0		\$761.85	\$761.85	\$870.00		\$0.00	

4. Complete the following procedures as appropriate to identify the product(s) being received:
 - Click a firearm's **Receive Firearm** button.
 - Click a serialized nonfirearm's **Receive Serialized Nonfirearm** button.
 - Enter a product's UPC (or other identification number):
 1. Select a product identification option (**Scan UPC**, **Scan MFG #**, **Scan Item #**, or **Scan Vendor Part #**) from the drop-down field.
 2. Scan or enter the appropriate identifier (UPC, etc.) in the blank field and press the **Enter** key.

Note: If the identifier is not already in the database, the system displays an identifier not found message window featuring either a set of **Yes** and **No** buttons or a single **OK** button. Complete one of the following as appropriate:

- Click a **Yes** button to display a new **Product Edit** window for the entered identifier. (Refer to [Manage Product Information \(see page 149\)](#) for information on using this window.)
- Click a **No** button to close the window and use the **Product Search** function to locate the desired item.
- Click an **OK** button to close the window and use the **Product Search** function to locate the desired item.

- Select product(s) through the **Product Search** function:
 1. Click the **Product Search** button to display the **Product Search** window.
 2. Select the product(s) to be received.

Note: Multiple standard (non-serialized) products may be selected from the window. Although this screen allows for the selection of multiple serialized (firearm or nonfirearm) products, the system will display a description window for only one of them. For this reason, RTG suggests selecting only one serialized product at a time through this feature.

Refer to [Select a Single Product \(see page 27\)](#) and [Select One or More Products \(see page 28\)](#) as appropriate.

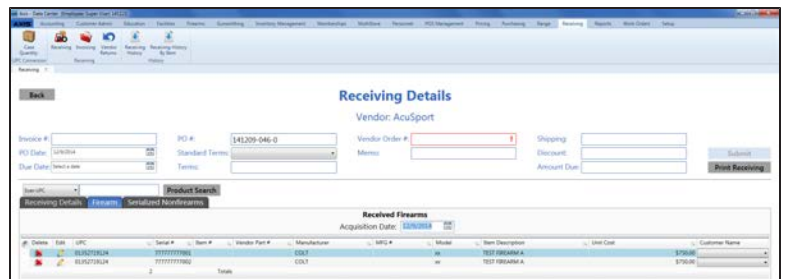
5. If the system displays a **Vendor Product Detail** window, [Complete the Vendor Product Detail Window \(see page 373\)](#) as appropriate.
6. The system displays information based on the type of product identified:

If a firearm was identified... The system displays the **Firearm Description** window.

1. [Describe a Firearm \(see page 37\)](#).

Note: To receive multiples of the same firearm in a single step, enter a serial number in the **Serial Number(s)** field and press the **Enter** key to create a line for the next serial number.

2. The product list displays the selected firearm and increases the value in its **Qty Received** field by the quantity of entered serial numbers.
3. Click the **Firearm** tab to display each unique firearm/serial number combination.



4. If needed, edit the date in the **Acquisition Date** field to reflect the proper date of receiving for the Bound Book(s).

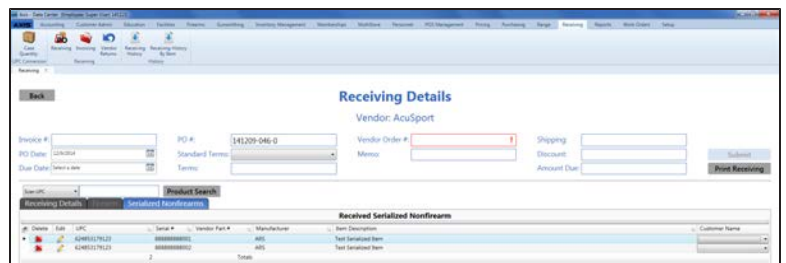
If a serialized nonfirearm product was identified...

The system displays the **Serialized Nonfirearm Description** window.

1. [Describe a Serialized Nonfirearm Item \(see page 39\)](#).

Note: To receive multiples of the same item in a single step, enter a serial number in the **Serial Number(s)** field and press the **Enter** key to create a line for the next serial number.

2. The product list displays the selected serialized product and increases the value in its **Qty Received** field by the quantity of entered serial numbers.
3. Click the **Serialized Nonfirearms** tab to display each unique product/serial number combination.



If a **standard (non-serialized) product** was identified...

The system displays the selected product in the product list and increases the value in its **Qty Received** field by one. (Refer to [Edit a Product's Quantity](#) for information on manually editing this field.)

7. Complete the following procedures as needed to update received products:

Edit a Product's Quantity

1. Locate the product in the product list.
2. Edit the number in the product's **Qty Received** field.
3. Continue with the procedure below.

Edit a Product's Information

1. Click a product's **Edit** button to display its **Product Edit** window.

Del	Tax Type	Description	Tax Rate

Del	Type	Description	Price

2. Edit product information as needed.
Note: Refer to [Manage Product Information \(see page 149\)](#) for more information on modifying information in this window.
3. Click the **Submit** button to close the **Product Edit** window.
4. Continue with the procedure below.

Edit a Firearm's Serial Number or Description

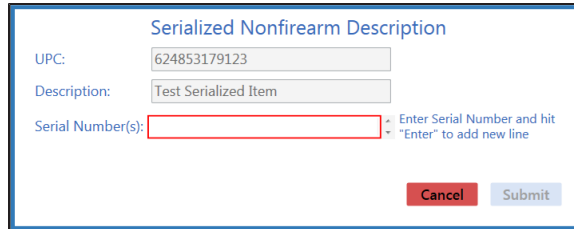
1. Locate the firearm on the **Firearms** tab.
2. Click the firearm's **Edit** button to display its **Firearm Description** window.
3. Edit the serial number in the **Serial Number(s)** field as needed.

Note: Refer to [Describe a Firearm \(see page 37\)](#) for information on changing values in other fields.

4. Click the **Submit** button to close the **Firearm Description** window.
5. Continue with the procedure below.

Edit a Serialized Nonfirearm Product's Serial Number

1. Locate the serialized nonfirearm product on the **Serialized Nonfirearms** tab.
2. Click the product's **Edit** button to display its **Serialized Nonfirearm Description** window.



3. Edit the serial number in the **Serial Number(s)** field as needed.
4. Click the **Submit** button to close the **Serialized Nonfirearm Description** window.
5. Continue with the procedure below.

8. Enter/edit Received Values as needed for each item.

Note: A user must be granted the **ProductCost** permission to view/use some of these fields.

Note: If an item is a firearm or a serialized non-firearm product, some of these fields may not be edited directly.

Qty Ordered	Enter the quantity of the item ordered.
Qty Received	Enter the quantity of the item received.
Unit Cost	Enter the actual unit cost for the item.
Retail Price	Enter the retail price for the item to automatically calculate and display the GP % value. Note: GP% = (Retail Price - Unit Cost) / Retail Price
GP %	Enter the gross profit percentage for the item to automatically calculate and display the Retail Price value. Note: Retail Price = Unit Cost / (1-GP%)
Ext. Cost	The system automatically calculates this amount by multiplying the Qty Received by the Unit Cost .

9. Enter/edit Purchase Order information in the window as needed.

Note: Required fields and settings are displayed with red borders.

Invoice #	Enter the invoice number. Note: If an invoice number is not available, enter a placeholder number (e.g., employee initials and the received date/time) and revise it at a later date.
PO Date	Enter the purchase order date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.

Due Date	Enter the date payment is due to the vendor (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
PO #	Enter the purchase order number.
Standard Terms	Select the appropriate terms option from the drop-down field.
Terms	Enter additional or non-standard terms.
Vendor Order #	Enter the vendor's order number.
Memo	Enter notes as needed.
Shipping	Enter shipping charges (e.g., freight, fuel surcharge, fees, etc.) included on the invoice.
Discount	Enter the discount amount for the entire invoice. (Do not include discounts for individual items as these are entered in each item's Discount % or Amount cell.)
Amount Due	Enter the total amount due for the invoice. To calculate this amount, add the sum of all Ext. Cost fields to the amount in the Shipping field and subtract the amount in the Discount field.

- Click the **Submit** button to display the **Label Printing** window.

Label Printing
Select Items and Quantity to Print
& Detail Item Cost Adjustment
Purchase Order # 141209-049-0

Qty to Print	UPC	Item Description	Qty Ordered	Qty Received	Qty Returned	QOH	Last Cost	Unit Cost	Retail Price
1	01352719124	TEST FIREARM A	1	1	0	75	\$750.00	\$750.00	\$850.00
1	01352719124	TEST FIREARM A	1	1	0	75	\$750.00	\$750.00	\$850.00
2	624853179123	Test Serialized Item	2	2	0	24	\$10.00	\$0.00	\$20.00
2	99999999001	Gloves	2	2	0	59	\$1.85	\$1.85	\$0.00
6	Totals								

Print Receiving **Cancel** **Submit**

- Complete the [Label Printing Window \(see page 375\)](#) to print labels and/or a receiving details report as needed.
- The system sends the purchase order to the **Receiving History** screen and generates a corresponding invoice on the **Invoicing** screen.
- Click the tab's **Close** button to close the screen.

Note: When appropriate, complete the [Manage Invoices \(see page 378\)](#) procedure to process the invoice for the purchase order.
If needed, complete the [View and Use the Receiving History Record \(see page 385\)](#) procedure to review the purchase order.

Import Purchase Order Data

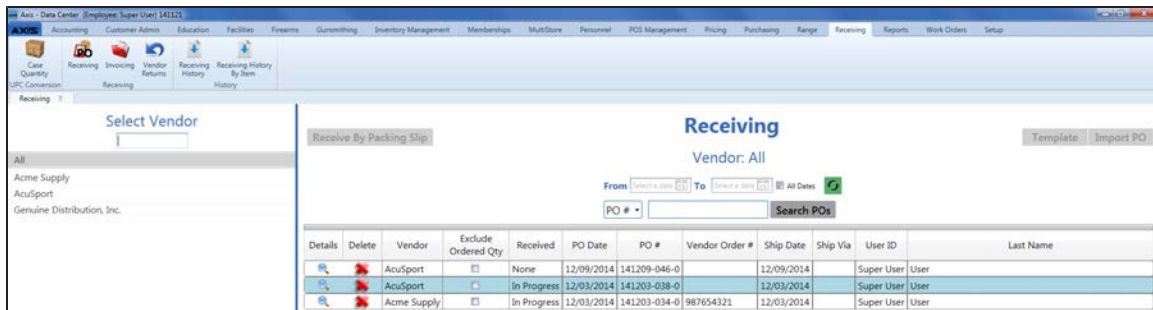
Complete the following procedure to import purchase order data into the **Receiving** screen by creating, populating, and importing a formatted Excel file.

1. Navigate to the **Receiving** screen.

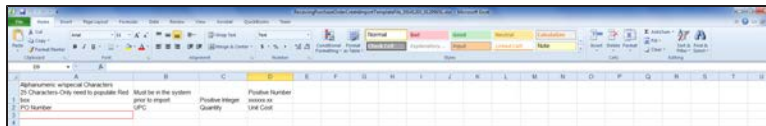
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Receiving** from the main menu to display the **Receiving** screen.



2. Click the appropriate vendor name in the **Select Vendor** list to activate the **Template** and **Import PO** buttons.
3. Click the **Template** button to export the template format to an Excel file.



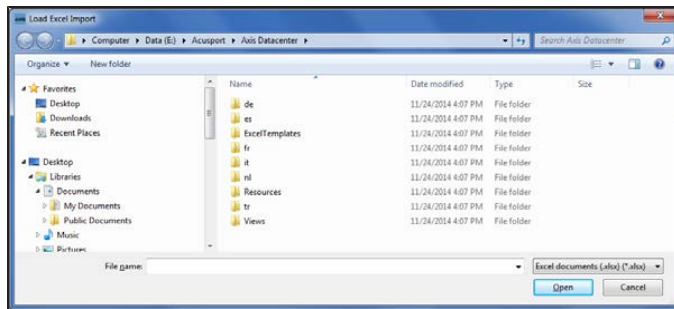
4. Populate the Excel file with purchase order information.

Note: The file must adhere to the validation requirements indicated in row 1 and below:

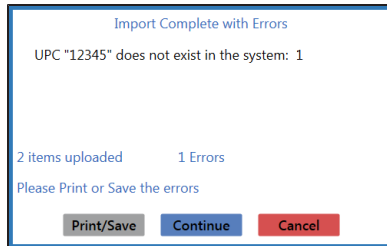
- All UPC's must be in the system.
- All quantities must be positive integers.
- A PO number may be entered once (in cell A3) for the entire purchase order. If a PO number is not entered, the system will generate one.

Note: If the file contains a PO number that is already in use, the system will allow the file to be imported. If an imported file is a copy of an existing PO, be sure to delete the duplicate PO(s) from the system.

5. Save the Excel file.
6. Navigate to the **Receiving** screen and click the appropriate vendor name in the **Select Vendor** list to activate the **Template** and **Import PO** buttons.
7. Click the **Import PO** button to display the **Load Excel Import** window.

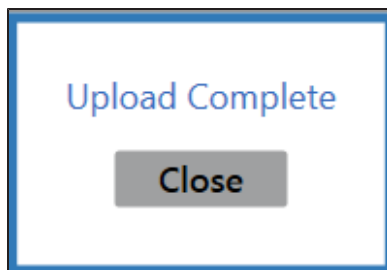


8. Browse to the desired location.
9. Double-click the saved Excel file to select it and start the import process.
10. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
11. When the import is complete, the system displays the **Upload Complete** window.



12. Click the **Close** button to close the window.
13. Complete the following procedure to view the imported purchase order:
 1. Click the tab's **Close** button to close the screen.
 2. Navigate to the **Receiving** screen.
 3. Click the imported purchase order's **Details** button to display its **Receiving Details** screen.

Complete the Vendor Product Detail Window

Complete the following procedure to complete the **Vendor Product Detail** window that appears during the receiving process.

1. Navigate to the **Vendor Product Detail** window.
 1. [Receive Inventory Items](#) (see page 364).
 2. When an item that does not have a vendor part number is identified during the receiving process, the system displays the **Vendor Product Detail** window.

Note: To control the behavior of the **Vendor Product Detail** window for all products, refer to [Manage the Vendor Product Detail Windows](#) (see page 81).

2. Complete one of the following procedures as appropriate to close the window:

Create a Vendor Part Number for this product

1. Enter/edit the information in the fields:

Vendor	The vendor option is preselected and cannot be changed.
Vendor Part #	Enter the vendor's part number for the product.
Catalog Cost	Enter the product's cost from the vendor's catalog.
Vendor Priority	Select the vendor's relative rank (1-5) among possible vendors of this product from the drop-down.
Sell Pack	Enter the minimum number (generally 1) of the product that can be purchased.

2. Click the **Submit** button to create a vendor part number for the product.

Note: The system will no longer display the **Vendor Product Detail** window when this product is identified on a purchase order for the associated vendor during the receiving process.

Skip the creation of a Vendor Part Number for this product

Click the **Cancel** button to close the window.

Note: The system will continue to display the **Vendor Product Detail** window when this product is identified during the receiving process.

Disable the Vendor Product Detail window for this product

1. Check the **Do not show the Vendor Product Detail screen for this UPC** checkbox.
2. Click the **Submit** button to close the window.

Note: The system will no longer display the **Vendor Product Detail** window when this product is identified during the receiving process. Refer to [Manage the Vendor Product Detail Windows \(see page 81\)](#) for information on undoing this procedure.

-
3. Continue receiving the product.

Complete the Label Printing Window

Complete the following procedure to complete the **Label Printing** window that appears during various processes.

1. Navigate to the **Label Printing** window.

Complete any of the following procedures to display the **Label Printing** window:

- [Receive Inventory Items \(see page 364\)](#):
Enter data on the **Receiving Details** screen and click the **Submit** button.
- [Manage Invoices \(see page 378\)](#):
Enter data on the **Invoice Details** screen and click the **Submit** button.
- [View and Use the Receiving History Record \(see page 385\)](#):
Click a **Details** button to display a corresponding details history screen and click an item's **Print** button.

The screenshot shows the 'Label Printing' window with the title 'Select Items and Quantity to Print & Detail Item Cost Adjustment' and 'Purchase Order # 141209-049-0'. Below the title is a table with columns: Qty to Print, LIPC, Item Description, Qty Ordered, Qty Received, Qty Returned, QOH, Last Cost, Unit Cost, and Retail Price. The table contains three rows of data and a Totals row. At the bottom of the window are three buttons: 'Print Receiving', 'Cancel', and 'Submit'.

Qty to Print	LIPC	Item Description	Qty Ordered	Qty Received	Qty Returned	QOH	Last Cost	Unit Cost	Retail Price
<input type="checkbox"/>	1	01352719124 TEST FIREARM A	1	1	0	75	\$750.00	\$750.00	\$850.00
<input type="checkbox"/>	1	01352719124 TEST FIREARM A	1	1	0	75	\$750.00	\$750.00	\$850.00
<input type="checkbox"/>	2	624851179123 Test Serialized Item	2	2	0	24	\$10.00	\$0.00	\$20.00
<input type="checkbox"/>	2	99999999001 Gloves	2	2	0	59	\$1.85	\$1.85	\$0.00
6	Totals								

Note: A user must be granted the **ProductCost** permission to view/use some of the fields on this window.

2. Complete the following procedures as appropriate:

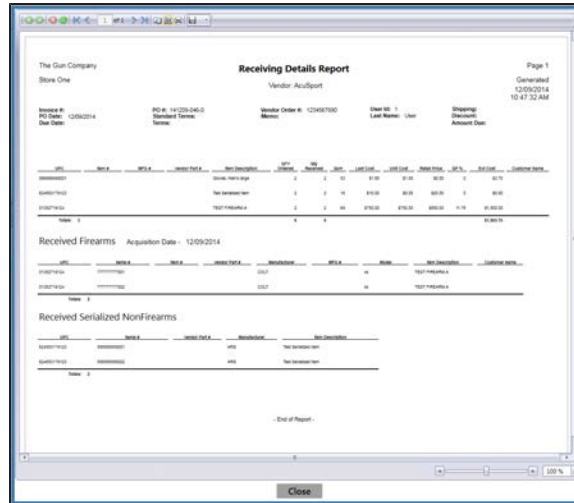
Print label(s) for the selected product(s)

1. Complete any of these procedures to select the product(s) for which labels will be printed:
 - Check a product's checkbox to select it.
 - Uncheck a product's checkbox to deselect it.
 - Check the **Qty to Print** column header checkbox to select all products.
 - Uncheck the **Qty to Print** column header checkbox to deselect all products.
2. If desired, edit the number in a selected product's **Qty to Print** field.
3. If desired, edit the amount in a selected product's **Unit Cost** field.

Note: This field can only be modified when printing from a receiving record.
4. If desired, edit the number in a selected product's **Retail Price** field.
5. Click the **Submit** button to print labels for selected products and close the **Label Printing** window.

Print a Receiving Details Report

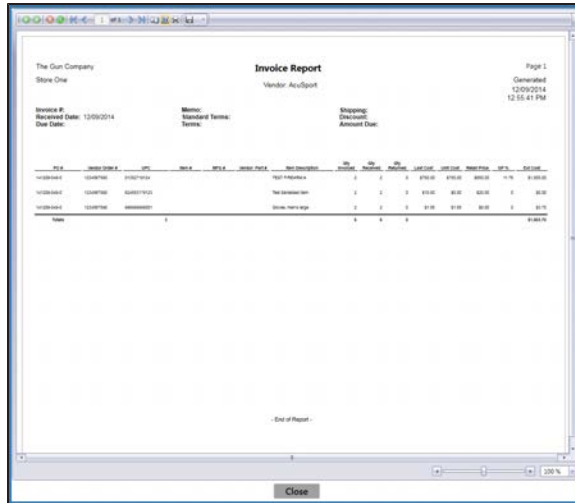
1. If available, click the **Print Receiving** button to display the **Receiving Details Report** window.



2. Adjust display as desired.
3. Click the **Print report** button to display the **Print** window.
4. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
5. Click the **Print** button to print the document.
6. Click the **Close** button on the **Receiving Details Report** window to close it.
7. Complete either of the following to close the **Label Printing** window:
 - **Print product labels** as needed.
 - Click the **Cancel** button.

Print an Invoice Report

1. If available, click the **Print Invoice** button to display the **Invoice Report** window.



2. Adjust display as desired.
3. Click the **Print report** button to display the **Print** window.
4. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
5. Click the **Print** button to print the document.
6. Click the **Close** button on the **Invoice Report** window to close it.
7. Complete either of the following to close the **Label Printing** window:
 - **Print product labels** as needed.
 - Click the **Cancel** button.

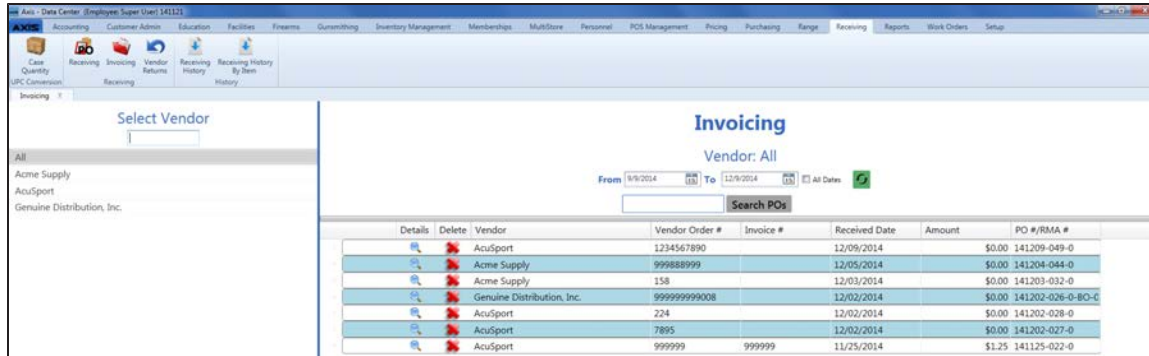
Manage Invoices

1. Navigate to the **Invoicing** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Invoicing** from the main menu to display the **Invoicing** screen.



2. Complete any of the following procedures as desired to determine which invoices are displayed on the screen:

- **Filter by Vendor:**

Click a vendor name in the **Select Vendor** list to display only invoices for that vendor. (Click the **All** vendor name to display invoices for all vendors.)

Note: If needed, enter all or part of a vendor's name in the field to show only matching vendors in the **Select Vendor** list.

- **Filter by Date:**

Uncheck the **All Dates** checkbox, enter dates in the **From** and **To** fields, and click the **Refresh** button to display only invoices from that date range.

- **Filter by PO Number:**

Enter all or part of a PO number in the **Search POs** field and click the **Search POs** button to display only purchase orders that contain the entered text.

- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Complete the following procedures as needed to manage invoices:

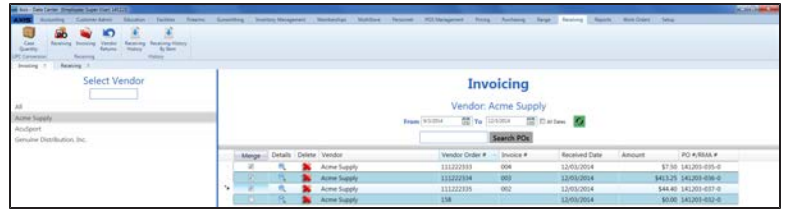
Complete an Invoice

1. Click an invoice's **Details** button to display the **Invoicing Details** screen.

2. Continue with the procedure below.

Merge Invoices

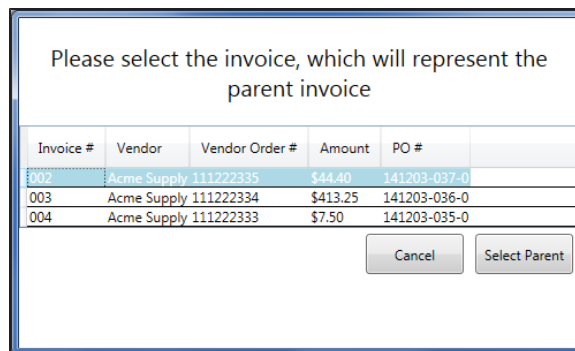
1. Click the appropriate vendor name in the **Select Vendor** list to activate the **Merge** column.



2. Check an invoice's **Merge** column checkbox to include it in the merge.

Note: At least two invoices must be checked to perform a merge.

3. Click the **Merge** button (the **Merge** column header) to display the parent invoice selection window.



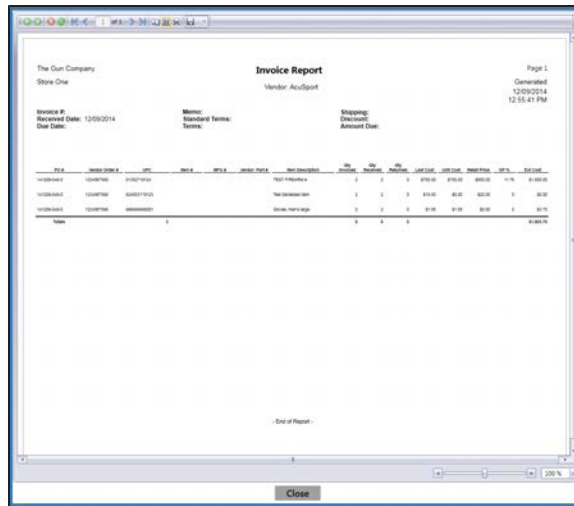
4. Click an invoice to select it as the parent invoice.

Note: The parent invoice's identifying information will display on the **Invoicing Details** screen.

5. Click the **Select Parent** button to combine the selected invoices into a single entry on the **Invoicing** screen.

Print an Invoice Report

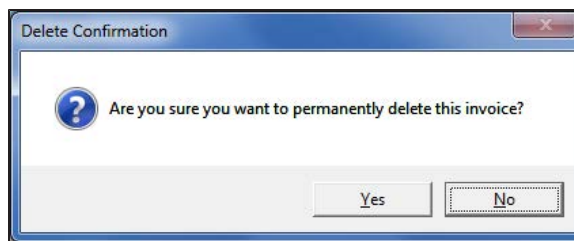
1. Click an invoice's **Details** button to display the **Invoicing Details** screen.
2. Enter/edit data as needed.
3. Click the **Print Invoice** button to display the **Invoice Report** window.



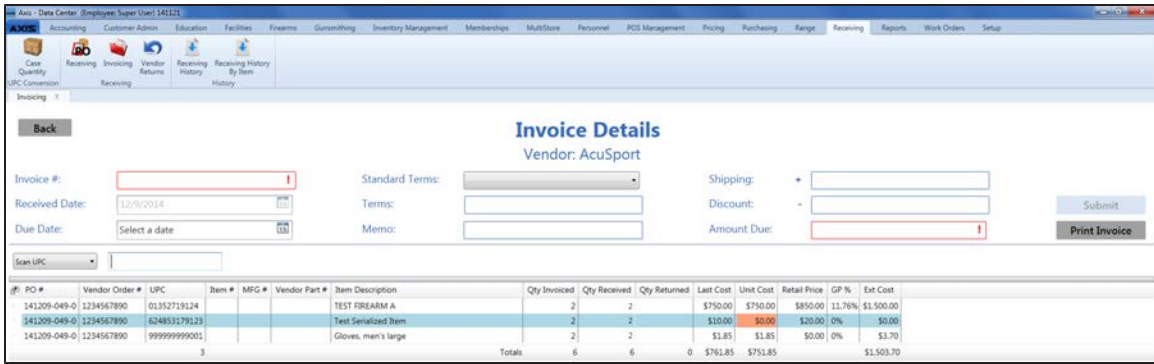
4. Adjust display as desired.
5. Click the **Print report** button to display the **Print** window.
6. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
7. Click the **Print** button to print the document.
8. Click the **Close** button on the **Invoice Report** window to close it.

Delete an Invoice

1. Click an invoice's **Delete** button to display a deletion confirmation window.



2. Click the **Yes** button to remove the invoice from the screen.
Note: A deleted invoice cannot be retrieved.
 3. Click the tab's **Close** button to close the screen.
-



4. Enter/edit Invoice Values as needed for each item.

Note: A user must be granted the **ProductCost** permission to view/use some of these fields.

Qty Invoiced	Enter the quantity of the item being invoiced.
Unit Cost	Enter the actual unit cost for the item.
Retail Price	Enter the retail price for the item to automatically calculate and display the GP % value. Note: GP% = (Retail Price - Unit Cost) / Retail Price
GP %	Enter the gross profit percentage for the item to automatically calculate and display the Retail Price value. Note: Retail Price = Unit Cost / (1-GP%)
Ext. Cost	The system automatically calculates this amount by multiplying the Qty Invoiced by the Unit Cost .

5. Enter Invoice information in the window.

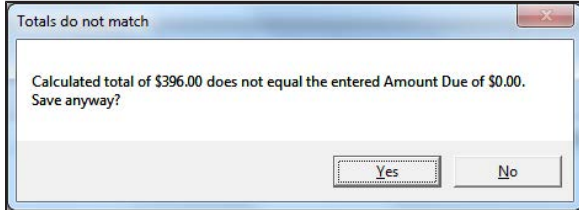
Note: Required fields and settings are displayed with red borders.

Invoice #	Enter the invoice number. Note: If an invoice number is not available, enter a placeholder number (e.g., employee initials and the received date/time) and revise it at a later date.
Received Date	Enter the invoice date (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Due Date	Enter the date payment is due to the vendor (mm/dd/yyyy) or Select a Date (see page 24) with the calendar button.
Standard Terms	Select the appropriate terms option from the drop-down field.
Terms	Enter additional or non-standard terms.
Memo	Enter notes as needed.
Shipping	Enter shipping charges (e.g., freight, fuel surcharge, fees, etc.) included on the invoice.
Discount	Enter the discount amount for the entire invoice. (Do not include discounts for individual items as these are entered in each item's Discount % or Amount cell.)

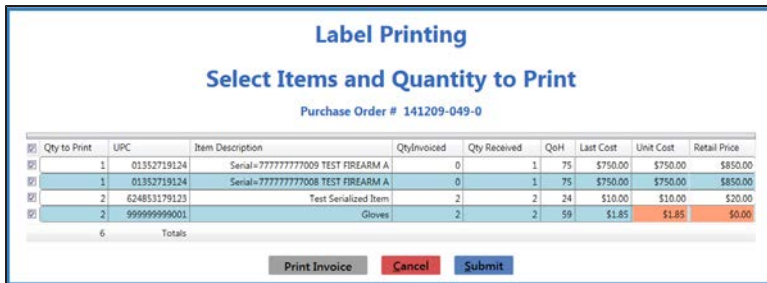
Amount Due	Enter the total amount due for the invoice. To calculate this amount, add the sum of all Ext. Cost fields to the amount in the Shipping field and subtract the amount in the Discount field.
-------------------	---

- When all fields have been completed, click the **Submit** button to display the **Label Printing** window.

Note: If the value in the **Amount Due** field does not equal the calculated value (sum of all **Ext. Cost** fields + **Shipping** charges - **Discount**), the system displays a **Totals do not match** error message window.



Click the **No** button to close the window and make corrections as needed.



- [Complete the Label Printing Window \(see page 375\)](#) to print labels and/or an invoice report as needed.
- The system sends the invoice to the **Receiving History** screen.
- Click the tab's **Close** button to close the screen.

Note: If needed, complete the [View and Use the Receiving History Record \(see page 385\)](#) procedure to review the invoice.

Manage Case Quantities

1. Navigate to the **Case Quantity** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.



2. Complete the following procedures as needed to manage case quantities:

Set Up a Case Quantity

1. Click the **Search** button beside the **Selling Unit UPC** field to display the **Product Search** window.
2. [Select a Single Product \(see page 27\)](#) to identify the selling unit UPC (typically a single item).



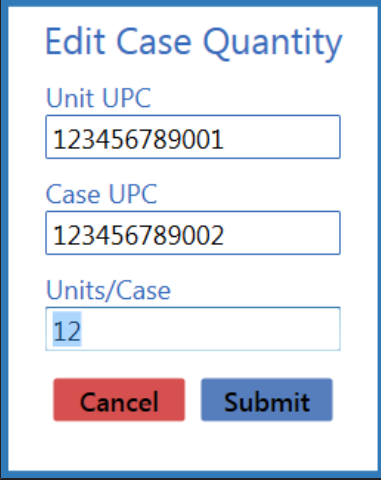
3. Click the **Search** button beside the **Case UPC** field to display the **Product Search** window.
4. [Select a Single Product \(see page 27\)](#) to identify the case UPC (typically a case or multi-pack item).

Note: If the case UPC does not exist in the database, refer to [Manage Product Information \(see page 149\)](#) for information on adding the case UPC to the product database. Be sure to uncheck the **Is Stock Item** checkbox and set the price according to the contents of the case UPC.

5. Enter the number of units per case in the **Units/Case** field.
6. Click the **Submit** button to add the case quantity to the screen.

Edit a Case Quantity

1. Click a case quantity's **Edit** button to display the **Edit Case Quantity** window.



Edit Case Quantity

Unit UPC
123456789001

Case UPC
123456789002

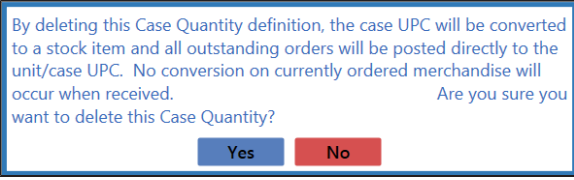
Units/Case
12

Cancel **Submit**

2. Edit the number of units per case in the **Units/Case** field.
3. Click the **Submit** button to display the case quantity's edited **Unit Count** on the screen.

Delete a Case Quantity

1. Click a case quantity's **Delete** button to display a deletion confirmation window.



By deleting this Case Quantity definition, the case UPC will be converted to a stock item and all outstanding orders will be posted directly to the unit/case UPC. No conversion on currently ordered merchandise will occur when received. Are you sure you want to delete this Case Quantity?

Yes **No**

2. Click the **Yes** button to remove the case quantity from the screen.
-
3. Click the tab's **Close** button to close the screen.

View and Use the Receiving History Record

1. Navigate to the **Receiving History** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Receiving History** from the main menu to display the **Receiving History** screen.

A screenshot of the 'Receiving History' screen in the application. The screen title is 'Receiving History' and it shows a date range of 11/25/2014 to 12/2/2014. Below the title is a table with columns: #, Details, Print, Submitted Date, Type, Vendor, PO #, Invoice #, and User ID. The table contains 15 rows of data.

#	Details	Print	Submitted Date	Type	Vendor	PO #	Invoice #	User ID
			12/02/2014	Invoice	Acusport	130619-021-0	3456765434	Super User
			12/02/2014	Invoice	Acusport	141125-023-0	999999997	Super User
			12/02/2014	Invoice	Acusport	141202-025-0	999999998	Super User
			12/02/2014	Invoice	Acusport	50-140310-005-1	999999999	Super User
			12/02/2014	Receiving	Acme Supply	141202-029-0		Super User
			12/02/2014	Receiving	Acusport	141202-028-0		Super User
			12/02/2014	Receiving	Acusport	130618-013-0		Super User
			12/02/2014	Receiving	Acusport	141125-023-0		Super User
			12/02/2014	Receiving	Acusport	141202-025-0		Super User
			12/02/2014	Receiving	Acusport	141202-027-0		Super User
			11/26/2014	Invoice	Genuine Distribution, Inc.	141126-024-0	9999990022	Super User
			11/26/2014	Receiving	Genuine Distribution, Inc.	141126-024-0		Super User
			11/25/2014	Receiving	Acusport	141125-022-0		Super User

2. Complete any of the following procedures as desired to determine which items are displayed on the screen:

- **Filter by Date:**

Enter starting and ending dates in the **Date Range** fields and click the **Refresh** button to display only items from that date range.

- **Filter by Type:**

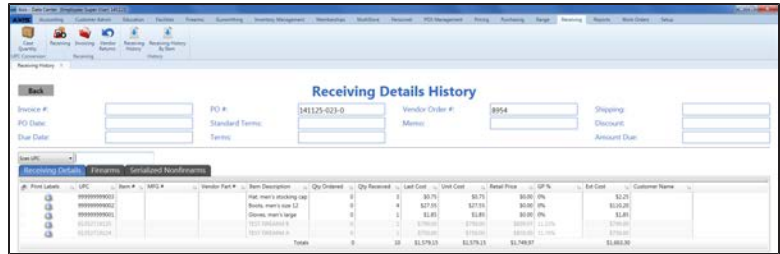
Select an option (**All**, **Receiving**, **Invoice**) from the **History Type** drop-down to display only items of the selected type.

- [Sort and Filter Onscreen Data \(see page 40\).](#)

3. Complete the following procedures as desired:

Review a Purchase Order

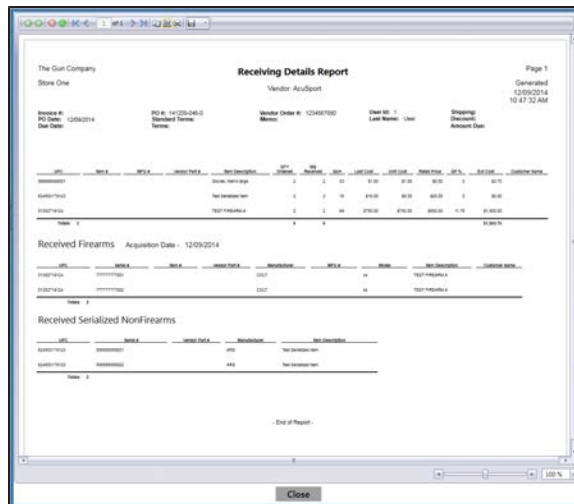
1. Click a purchase order's **Details** button to display its **Receiving Details History** screen.



2. If desired, click an item's **Print Labels** button to display the **Label Printing** window and [Complete the Label Printing Window \(see page 375\)](#) to print labels and/or a receiving details report as needed.
2. Click the **Back** button to close the **Receiving Details History** screen.

Print a Receiving Details Report

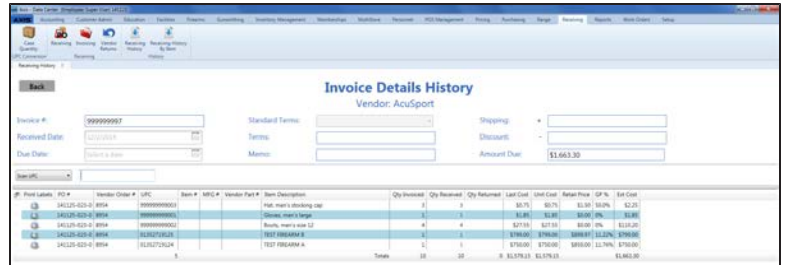
1. Click a purchase order's **Print** button to display its **Receiving Details Report** window.



2. Adjust display as desired.
3. Click the **Print report** button to display the **Print** window.
4. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
5. Click the **Print** button to print the document.
6. Click the **Close** button on the **Receiving Details Report** window to close it.

Review an Invoice

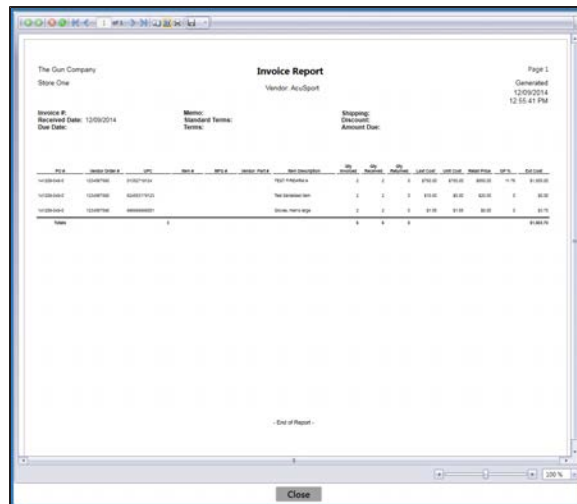
1. Click an invoice's **Details** button to display its **Invoice Details History** screen.



2. If desired, click an item's **Print Labels** button to display the **Label Printing** window and [Complete the Label Printing Window](#) (see page 375) to print labels and/or an invoice report as needed.
3. Click the **Back** button to close the **Invoice Details History** screen.

Print an Invoice Report

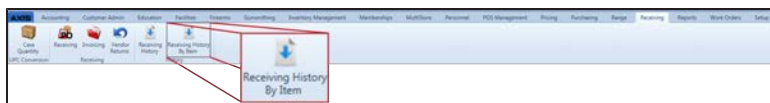
1. Click an invoice's **Print** button to display its **Invoice Report** window.



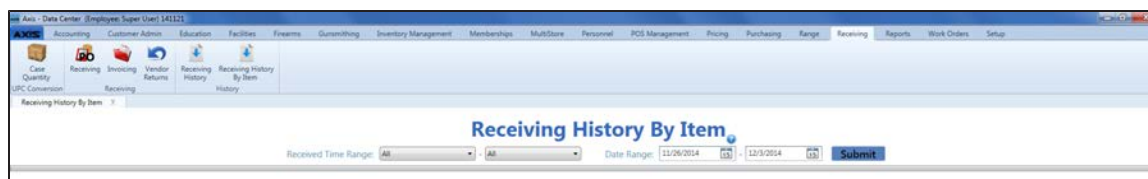
2. Adjust display as desired.
 3. Click the **Print report** button to display the **Print** window.
 4. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
 5. Click the **Print** button to print the document.
 6. Click the **Close** button on the **Invoice Report** window to close it.
4. Click the tab's **Close** button to close the screen.

View the Receiving History By Item Record

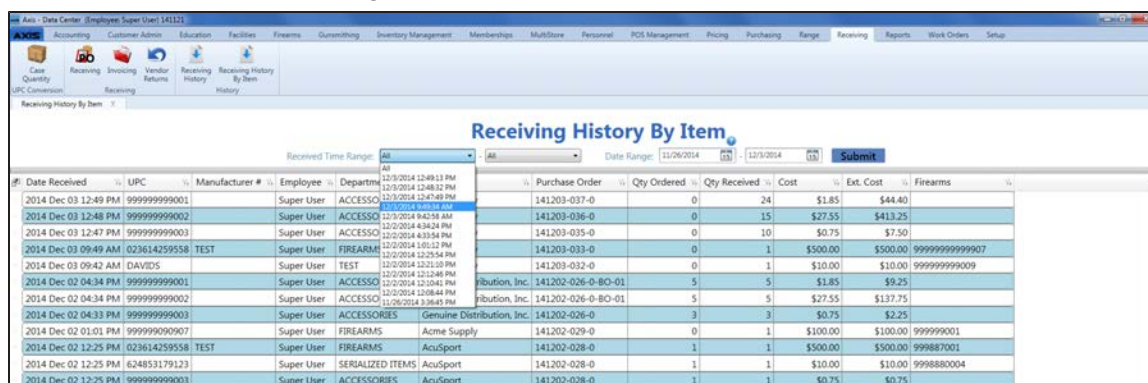
1. Navigate to the **Receiving History By Item** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Receiving History By Item** from the main menu to display the **Receiving History By Item** screen.



2. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display items from that date range.
3. Select starting and ending date/time combinations from the **Received Time Range** drop-downs to items from that date/time range.



4. [Sort and Filter Onscreen Data \(see page 40\)](#) as needed.
5. Click the tab's **Close** button to close the screen.

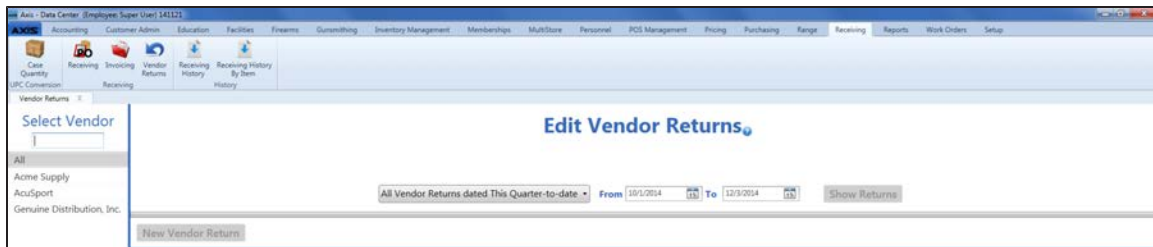
Manage Vendor Returns

1. Navigate to the **Edit Vendor Returns** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Receiving > Vendor Returns** from the main menu to display the **Edit Vendor Returns** screen.



2. Click a vendor name in the **Select Vendor** list to display the vendor's returns on the screen.

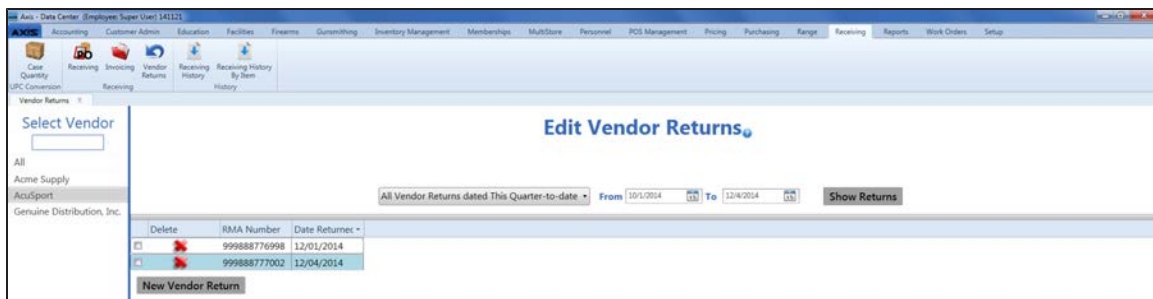
Note: If needed, enter all or part of a vendor's name in the field to show only matching vendors in the **Select Vendor** list.

3. Complete the following procedure to display returns from a particular time frame:

1. Select a predefined time frame option (e.g., "All Vendor Returns dated Last Quarter") from the drop-down at the top of the page to automatically fill the **From** and **To** fields.

Note: To create a custom time frame, select the "All Vendor Returns dated in Custom period" option from the drop-down field and enter starting and ending dates in the **From** and **To** fields.

2. Click the **Shows Returns** button to display all invoices dated during the time frame.



4. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

5. Complete the following procedures as appropriate to manage vendor returns:

Create a Vendor Return

1. Click the **New Vendor Return** button to display the return definition section.
2. Continue with the procedure below.

Edit a Vendor Return

1. Click a return's checkbox in the far left column to display its return definition section.
 2. Continue with the procedure below.
-

Delete a Vendor Return

1. Click a return's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the return from the screen.
3. Click the tab's **Close** button to close the screen.

Delete	RMA Number	Date Returned
<input type="checkbox"/>	999888776998	12/01/2014
<input type="checkbox"/>	999888777002	12/04/2014

New Vendor Return

RMA Number:

Date Returned: 12/3/2014

6. Enter/edit the RMA (return merchandise authorization) number in the **RMA Number** field.
7. Enter/edit the date of the return in the **Date Returned** field.
8. Complete the following procedure for each item to be returned:
 1. Click the **Add Item** button to create an open entry in the return detail table.
 2. If appropriate, select the associated purchase order from the **Purchase Order** drop-down.
 3. Select the item's UPC from the **UPC** drop-down (or scan/enter the desired UPC in the field).
 4. If the item is a firearm or serialized non-firearm item, complete one of the following procedures as appropriate:
 - Enter a Firearm's Log Number:
 1. Click the **Select** button in the **Firearm (Log #) Or Non-Firearm Serial Number** field to display the **Firearm Inventory** window.
 2. Check the firearm's **Select** checkbox (or enter its log number in **Scan Log # here** field and press the **Enter** key) to select the firearm.
 3. Click the **Submit** button to place the firearm's log number in the **Firearm (Log #) Or Non-Firearm Serial Number** field.
 - Enter a Serialized Non-Firearm Item's Serial Number:
 1. Click the **Select** button in the **Firearm (Log #) Or Non-Firearm Serial Number** field to display the **Select Product Serial Number** window..
 2. Select the appropriate serial number from the drop-down field.
 3. Click the **Select** button to place the item's serial number in the **Firearm (Log #) Or Non-Firearm Serial Number** field.
 5. Edit the amount in the **Qty Returned** field as needed.
 6. Select the vendor's remedy for the situation from the **Vendor Action** drop-down.

Note: If "Issue credit" is selected for one item in a return, it must be selected for all items in the return.
 7. Select the shipping paid option from the **Shipping Paid** drop-down.
 8. Enter the reason the item is being returned in the **Reason** field.
9. Click the **Submit** button to add/update the vendor return on the list.
10. Click the tab's **Close** button to close the screen.

Accounting Administration

The Accounting Module links accounting information in the AXIS RMS with a third party accounting program (i.e., QuickBooks).

- The Accounting Module works with all currently-supported versions of QuickBooks, but not with the web-based version.
- All computers on which the Accounting Module will be used must have AXIS RMS, a supported version of QuickBooks, and the QuickBooks SDK installed.
- Administrator rights are needed to perform the following procedures.

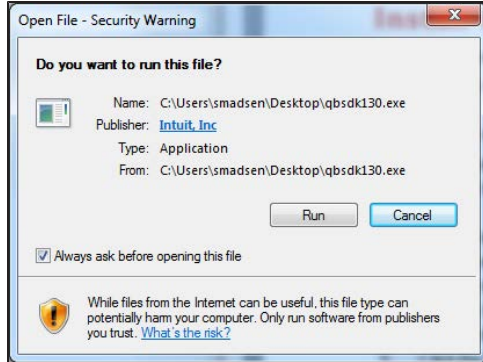
Accounting Procedures

- [Install the QuickBooks SDK File \(see page 392\)](#)
Complete this procedure one time (for each computer).
- [Configure the Accounting Module \(see page 393\)](#)
Complete this procedure one time for a single store.
- [Set Up Accounting Links and Features \(see page 394\)](#)
Complete this procedure one time to establish a link between components and match AXIS RMS elements to corresponding QuickBook elements. Repeat as needed in the future to add or update matches.
- [Post Accounts Payable Invoices to the Accounting Software \(see page 402\)](#)
Complete this procedure daily or on an as-needed basis to post accounting data to QuickBooks software.
- [Post Accounting Entries to the Accounting Software \(see page 404\)](#)
Complete this procedure daily or on an as-needed basis to post accounting data to QuickBooks software.
- [Post Inventory Adjustments to the Accounting Software \(see page 407\)](#)
Complete this procedure to post one or more inventory adjustment entries to the QuickBooks application.

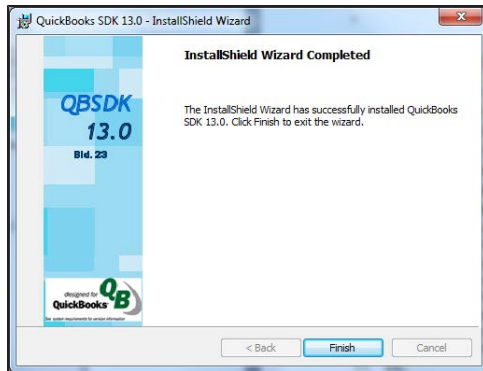
Install the QuickBooks SDK File

Complete the following procedure to install the QuickBooks SDK file.

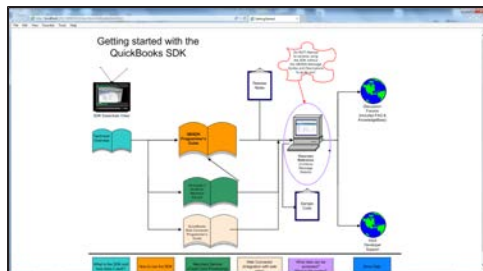
1. Contact **RTG Support Line** at RTGSupport@AcuSport.com or 1-800-547-7120 and request a link to the location of the **QuickBooks SDK File**.
2. Download the **QuickBooks SDK File** from the provided link/location.
3. Double-click the file to display the **Security Warning** window.



4. Click the **Run** button to display the **InstallShield Wizard** window and begin installation.



5. When the installation is complete, click the **Finish** button to display the **Getting started with the QuickBooks SDK** graphic in a new window.



6. Review the graphic as needed.
7. Click the window's **Close** button to close it.
8. Proceed to [Configure the Accounting Module \(see page 393\)](#).

Configure the Accounting Module

Complete the following procedure to configure the Accounting Module to work with QuickBooks.

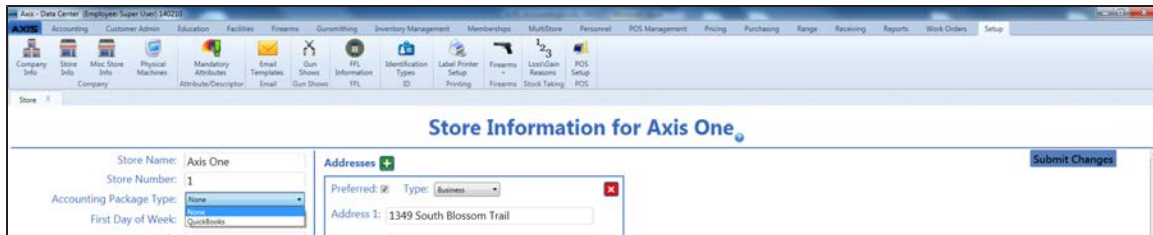
1. Navigate to the store's **Store Information for** screen.
 1. If it is open, close the **Data Center (IMS)** application.
 2. Make sure all other users are logged out of the QuickBooks application.
 3. Log in to the QuickBooks application with Administrator rights.
 4. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



5. Select **Setup > Store Info** from the main menu to display the **Store Look-up** window.

Note: If needed, enter all or part of a store's name in the **Store Name** field to restrict the stores shown in the list.

6. Double-click a store's name to display its **Store Information for** screen.



2. Select the "QuickBooks" option from the **Accounting Package Type** drop-down field.
3. Click the **Submit Changes** button to display a "Record saved" confirmation message below the button.
4. Close the **Data Center** application.

Set Up Accounting Links and Features

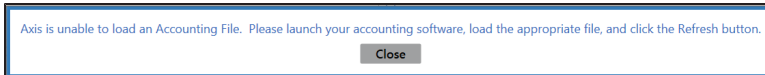
Complete the following procedure to establish links between the Accounting Module and associated QuickBooks accounts and locations.

1. **Navigate** to the **Accounting Setup** screen.
 1. If it is open, close the **Data Center (IMS)** application.
 2. Make sure all other users are logged out of the QuickBooks application.
 3. Log in to the QuickBooks application with Administrator rights.
 4. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

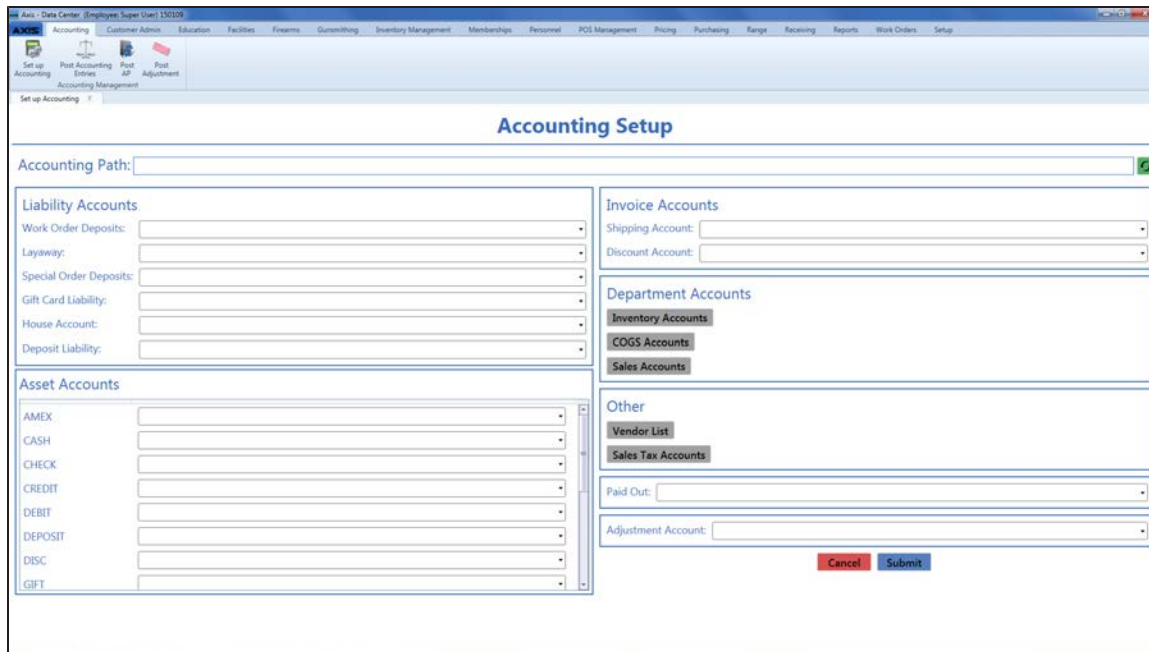


5. Select **Accounting > Set Up Accounting** from the main menu to display the **Accounting Setup** screen and an error message.

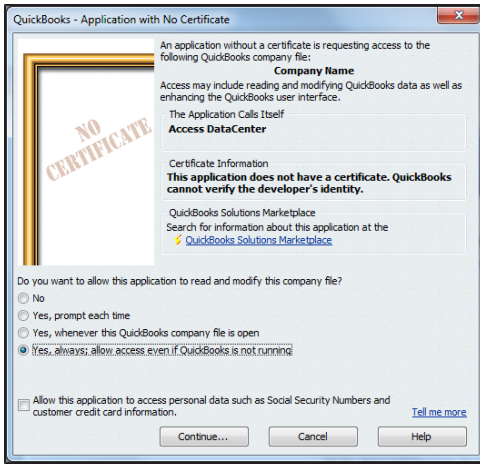
Note: If this message appears during initial setup, it may be ignored. If it appears during a subsequent procedure, check the QuickBooks program to make sure it is open and there are no other users.



6. Click the **Close** button to close the window.



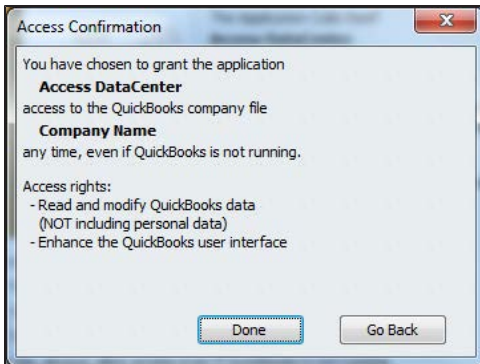
2. Click the green **Refresh** button to display the **Application with No Certificate** window.



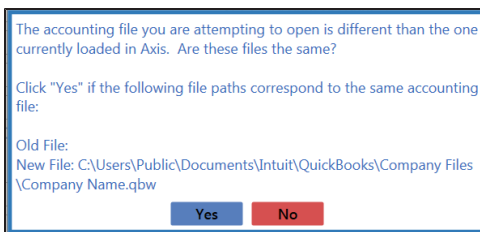
3. Click the button in front of the **Yes, always; allow access even if QuickBooks is not running** option to select it.
4. Click the **Continue** button to display the **Confirm to Proceed** window.



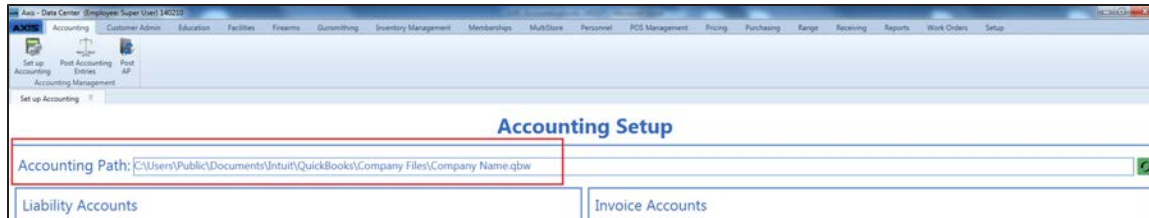
5. Click the **Yes** button to display the **Access Confirmation** window.



6. Click the **Done** button to close the window and display a confirmation window on the **Accounting Setup** screen.



7. Click the **Yes** button to populate the **Accounting Path** field on the **Accounting Setup** screen.



8. For each account type (**Work Order Deposits**, **Layaway**, **Cash Deposits**, etc.) in the **Liability Accounts**, **Asset Accounts**, and **Invoice Accounts** sections, select the corresponding QuickBooks account from the associated drop-down field.

Note: If no accounts are available in the drop-down, no valid accounts could be located in the QuickBooks program.

9. Complete the following procedures to establish links between the module and associated QuickBooks accounts:

Link Inventory Accounts to Departments

1. Click the **Inventory Accounts** button to display the **Inventory Accounts** window.

Department	GL Account
<input type="checkbox"/> ACCESSORIES	
<input type="checkbox"/> ACCESSORIES	
<input type="checkbox"/> AMMUNITION	
<input type="checkbox"/> AMMUNITION	
<input type="checkbox"/> EDUCATIONAL CLASSES	
<input type="checkbox"/> FIREARMS	
<input type="checkbox"/> FIREARMS	
<input type="checkbox"/> GIFT	
<input type="checkbox"/> GUN ACCESSORIES	

Unassigned Inventory:

Group Change

Set to selected account:

2. Complete these procedures as needed to link QuickBooks Inventory accounts to Departments:
 - Link an account to a Department:
 1. Locate the Department's drop-down field in the **GL Account** column.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
 - Link an account to multiple departments:
 1. Check the checkboxes in front of all desired Departments to select them (or click the **Select All** button to select all Departments).
 2. Select the corresponding QuickBooks account (or the blank option) from the **Set to selected account** drop-down field.
 3. Click the **Set** button.
 - Link an account to unassigned inventory (for items not currently assigned to a department):
 1. Locate the **Unassigned Inventory** drop-down field.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
3. Click the **Submit** button to save changes and display a confirmation window.
4. Click the **OK** button to close the window.

Note: When an unassigned item is assigned to a Department, it will automatically track to the account linked to that Department.

Link Cost of Goods Sold (COGS) Accounts to Departments

1. Click the **Cogs Accounts** button to display the **COGS Accounts** window.

The screenshot shows the 'COGS Accounts' window. It features a table with two columns: 'Department' and 'GL Account'. The 'Department' column contains a list of departments with checkboxes: ACCESSORIES, AMMUNITION, EDUCATIONAL CLASSES, FIREARMS, and GUN ACCESSORIES. The 'GL Account' column contains dropdown menus. Below the table is a section for 'Unassigned Cost of Goods Sold' with a dropdown menu. At the bottom, there is a 'Group Change' section with a 'Select All' button, a 'Set to selected account:' dropdown, and a 'Set' button. 'Cancel' and 'Submit' buttons are also present.

2. Complete these procedures as needed to link QuickBooks Cost of Goods Sold accounts to Departments:
 - Link an account to a Department:
 1. Locate the Department's drop-down field in the **GL Account** column.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
 - Link an account to multiple departments:
 1. Check the checkboxes in front of all desired Departments to select them (or click the **Select All** button to select all Departments).
 2. Select the corresponding QuickBooks account (or the blank option) from the **Set to selected account** drop-down field.
 3. Click the **Set** button.
 - Link an account to unassigned cost of goods sold (for items not currently assigned to a department):
 1. Locate the **Unassigned Cost of Goods Sold** drop-down field.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
3. Click the **Submit** button to save changes and display a confirmation window.
4. Click the **OK** button to close the window.

Note: When an unassigned item is assigned to a Department, it will automatically track to the account linked to that Department.

Link Sales Accounts to Departments

1. Click the **Sales Accounts** button to display the **Sales Accounts** window.

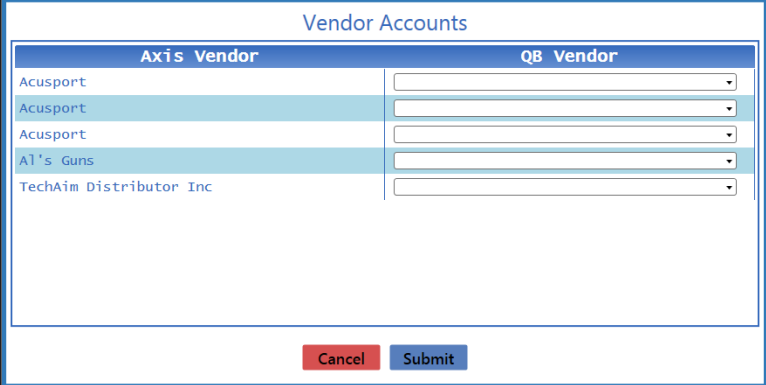
The screenshot shows the 'Sales Accounts' window. It features a table with two columns: 'Department' and 'GL Account'. The 'Department' column contains a list of categories with checkboxes: ACCESSORIES, AMMUNITION, EDUCATIONAL CLASSES, FIREARMS, and GUN ACCESSORIES. The 'GL Account' column contains dropdown menus. Below the table is an 'Unassigned Sales:' dropdown menu. At the bottom, there is a 'Group Change' section with a 'Select All' button, a 'Set to selected account:' dropdown menu, and a 'Set' button. At the very bottom are 'Cancel' and 'Submit' buttons.

2. Complete these procedures as needed to link QuickBooks Sales accounts to Departments:
 - Link an account to a Department:
 1. Locate the Department's drop-down field in the **GL Account** column.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
 - Link an account to multiple departments:
 1. Check the checkboxes in front of all desired Departments to select them (or click the **Select All** button to select all Departments).
 2. Select the corresponding QuickBooks account (or the blank option) from the **Set to selected account** drop-down field.
 3. Click the **Set** button.
 - Link an account to unassigned sales (for items not currently assigned to a department):
 1. Locate the **Unassigned Sales** drop-down field.
 2. Select the corresponding QuickBooks account (or the blank option to clear the field).
3. Click the **Submit** button to save changes and display a confirmation window.
4. Click the **OK** button to close the window.

Note: When an unassigned item is assigned to a Department, it will automatically track to the account linked to that Department.

Link Vendor Accounts to Vendors

1. Click the **Vendor List** button to display the **Vendor Accounts** window.



The screenshot shows a window titled "Vendor Accounts". It contains a table with two columns: "Axis Vendor" and "QB Vendor". The table has four rows of data. The first row is "Acusport" in the Axis Vendor column and a dropdown menu in the QB Vendor column. The second row is "Acusport" in the Axis Vendor column and a dropdown menu in the QB Vendor column. The third row is "Acusport" in the Axis Vendor column and a dropdown menu in the QB Vendor column. The fourth row is "Al's Guns" in the Axis Vendor column and a dropdown menu in the QB Vendor column. The fifth row is "TechAim Distributor Inc" in the Axis Vendor column and a dropdown menu in the QB Vendor column. At the bottom of the window, there are two buttons: "Cancel" and "Submit".

Axis Vendor	QB Vendor
Acusport	
Acusport	
Acusport	
Al's Guns	
TechAim Distributor Inc	

2. Complete this procedure for each Vendor in the **AXIS Vendor** column:
 1. Locate the Vendor's drop-down field in the **QB Vendor** column.
 2. Select the corresponding QuickBooks vendor (or the blank option to clear the field).

Note: If no vendors are available in the drop-down, no valid vendors could be located in the QuickBooks program.

3. Click the **Submit** button to save changes and display a confirmation window.
 4. Click the **OK** button to close the window.
-

Link Tax Accounts to Tax Types

1. Click the **Sales Tax Accounts** button to display the **Tax Accounts** window.

Tax Type	QB Tax Account	Tax Vendor
COUNTY TAX		
FIREARMS TAX		
STATE TAX		

Cancel Submit

2. Complete this procedure for each Tax Type in the **Tax Type** column:
 1. Locate the Tax Type's drop-down field in the **QB Tax Account** column.
 2. Select the corresponding QuickBooks tax account (or the blank option to clear the field).
 3. Locate the Tax Type's drop-down field in the **Tax Vendor** column.
 4. Select the corresponding QuickBooks tax vendor (or the blank option to clear the field).
3. Click the **Submit** button to save changes and display a confirmation window.
4. Click the **OK** button to close the window.

Link a QB Account to the Paid Out Account

Select the appropriate QuickBooks account from the **Paid Out** account's drop-down field.

Link a QB Account to the Adjustment Account

Select the appropriate QuickBooks account from the **Adjustment Account** drop-down field.

10. Click the **Submit** button to save changes and display an exit confirmation window.

Exit Setup and Save Changes?

Yes No

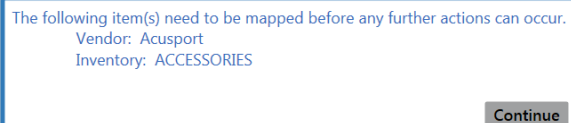
11. Click the **Yes** button to save changes and close the **Accounting Setup** screen.

Note: If a Department, Vendor, or Tax Type is added to the AXIS RMS following this initial setup, repeat the relevant portions of this procedure as needed to account for the new additions and any other changes.

Post Accounts Payable Invoices to the Accounting Software

Complete the following procedure to post one or more accounts payable invoices to the QuickBooks application.

Note: If an error message like the one shown below appears while completing this procedure, one or more of a selected invoice's data fields have not been mapped to corresponding QuickBooks accounts.



Complete the following procedure to correct this issue before proceeding:

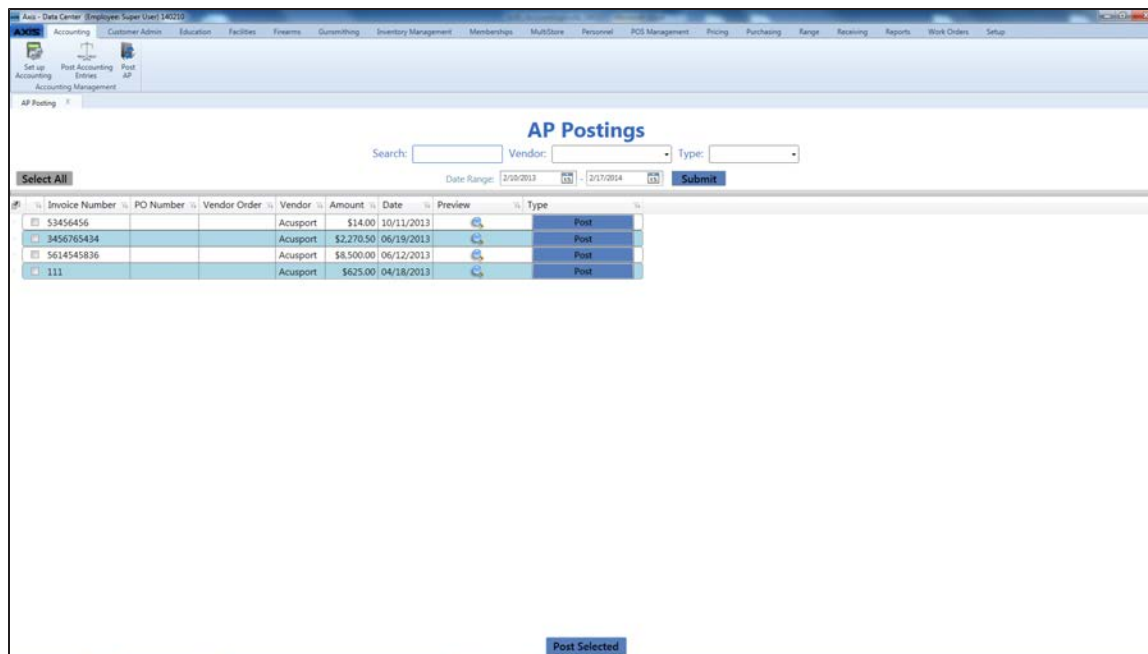
1. Note the unmapped element(s).
2. Click the **Continue** button to close the error message window.
3. Complete the appropriate portions of the [Set Up Accounting Links and Features \(see page 394\)](#) procedure to map the unmapped element(s) to the corresponding QuickBooks account(s).

1. Navigate to the **AP Postings** screen.

1. If it is open, close the **Data Center (IMS)** application.
2. Make sure all other users are logged out of the QuickBooks application.
3. Log in to the QuickBooks application with Administrator rights.
4. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



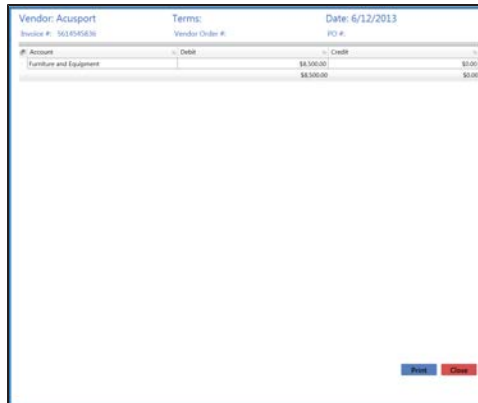
5. Select **Accounting > Post AP** from the main menu to display the **AP Postings** screen.



2. Complete any combination of the following to determine which invoices will display on the screen:
 - Enter the desired starting and ending dates in the **Date Range** fields.
 - Enter a search term in the **Search** field.
 - Select a vendor from the **Vendor** drop-down field.
 - Select a type (status) from the **Type** drop-down field.
3. Click the **Submit** button to display all invoices matching the selection criteria.
4. Complete the following procedures as appropriate:

Preview and Print an Invoice

1. Click the invoice's **View** button to display the invoice preview window.



2. If desired, click the **Print** button to display the **Print** window.
3. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
4. Click the **Print** button to print the invoice.
5. Click the **Close** button to close the invoice preview window.

Post a Single Invoice to QuickBooks Software

1. Locate the desired invoice.
2. Click the invoice's **Post** button in the **Type** column to post the invoice. This step changes the name of the button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

Note: Do not click the button in the **Type** column if it is named anything other than **Post**.

Post Multiple Invoices to QuickBooks Software

1. Check the checkboxes in front of all desired invoices to select them (or click the **Select All** button to select all invoices).

Note: Do not select an invoice if the button in its **Type** column cell is named anything other than **Post**.

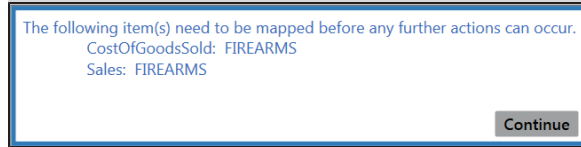
2. Click the **Post Selected** button to post the invoices. This step changes the name of each invoice's **Type** column cell button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

5. Click the tab's **Close** button to close the screen.

Post Accounting Entries to the Accounting Software

Complete the following procedure to post one or more general ledger entries to the QuickBooks application.

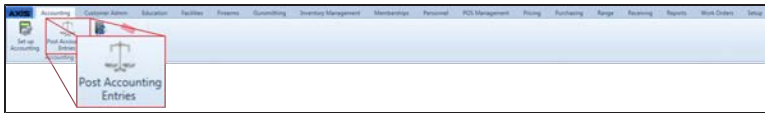
Note: If an error message like the one shown below appears while completing this procedure, one or more associated items have not been mapped to corresponding QuickBooks accounts.



Complete the following procedure to correct this issue before proceeding:

1. Note the unmapped element(s).
2. Click the **Continue** button to close the error message window.
3. Complete the appropriate portions of the [Set Up Accounting Links and Features \(see page 394\)](#) procedure to map the unmapped element(s) to the corresponding QuickBooks account(s).

1. **Navigate to the GL Postings screen.**
 1. If it is open, close the **Data Center (IMS)** application.
 2. Make sure all other users are logged out of the QuickBooks application.
 3. Log in to the QuickBooks application with Administrator rights.
 4. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



5. Select **Accounting > Post Accounting Entries** from the main menu to display the **GL Postings** screen.

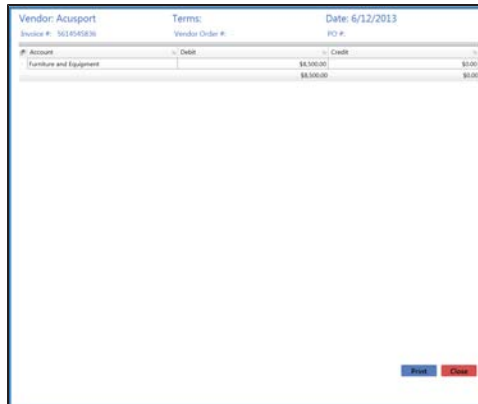


2. Complete any combination of the following to determine which entries will display on the screen:
 - Enter the desired starting and ending dates in the **Date Range** fields.
 - Select a type (status) from the **Type** drop-down field.

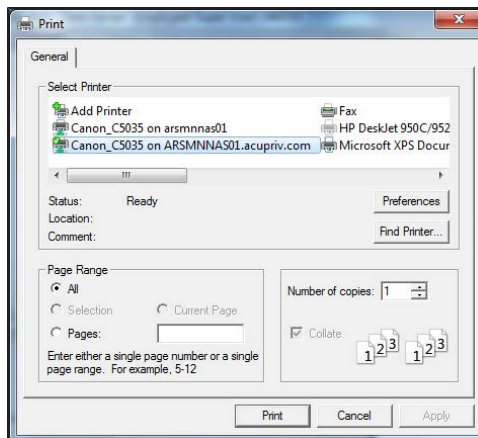
3. Click the **Submit** button to display all entries matching the selection criteria.
4. Complete the following procedures as appropriate:

Preview and Print an Invoice

1. Click the entry's **View** button to display the entry preview window.



2. If desired, click the **Print** button to display the **Print** window.



3. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
4. Click the **Print** button to print the entry.
5. Click the **Close** button to close the entry preview window.

Post a Single Entry to QuickBooks Software

1. Locate the desired entry.
2. Click the entry's **Post** button in the **Type** column to post the entry. This step changes the name of the button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

Note: Do not click the button in the **Type** column if it is named anything other than **Post**.

Post Multiple Entries to QuickBooks Software

1. Check the checkboxes in front of all desired entries to select them (or click the **Select All** button to select all entries).

Note: Do not select an entry if the button in its **Type** column cell is named anything other than **Post**.

2. Click the **Post Selected** button to post the entries. This step changes the name of each entry's **Type** column cell button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

-
5. Click the tab's **Close** button to close the screen.

Post Inventory Adjustments to the Accounting Software

Complete the following procedure to post one or more inventory adjustment entries to the QuickBooks application.

1. Navigate to the **Adjustment Postings** screen.
 1. If it is open, close the **Data Center (IMS)** application.
 2. Make sure all other users are logged out of the QuickBooks application.
 3. Log in to the QuickBooks application with Administrator rights.
 4. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



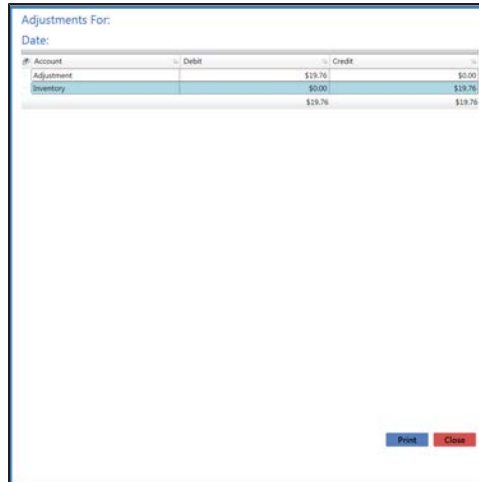
5. Select **Accounting > Post Adjustment** from the main menu to display the **Adjustment Postings** screen.



2. Complete any combination of the following to determine which entries will display on the screen:
 - Enter the desired starting and ending dates in the **Date Range** fields.
 - Select an adjustment type from the **Adjustment Type** drop-down field.
 - Select a type (status) from the **Type** drop-down field.
3. Click the **Submit** button to display all entries matching the selection criteria.
4. Complete the following procedures as appropriate:

Preview and Print an Adjustment Record

1. Click the entry's **Preview** button to display the entry preview window.



#	Account	Debit	Credit	%
	Adjustment	\$18.76	\$0.00	
	Inventory	\$20.00	\$18.76	
		\$18.76	\$18.76	

2. If desired, click the **Print** button to display the **Print** window.
3. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
4. Click the **Print** button to print the entry.
5. Click the **Close** button to close the entry preview window.

Post a Single Entry to QuickBooks Software

1. Locate the desired entry.
2. Click the entry's **Post** button in the **Type** column to post the entry. This step changes the name of the button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

Note: Do not click the button in the **Type** column if it is named anything other than **Post**.

Post Multiple Entries to QuickBooks Software

1. Check the checkboxes in front of all desired entries to select them (or click the **Select All** button to select all entries).

Note: Do not select an entry if the button in its **Type** column cell is named anything other than **Post**.

2. Click the **Post Selected** button to post the entries. This step changes the name of each entry's **Type** column cell button from **Post** to **Posted xx/xx/xxxx** (with xx/xx/xxxx being the date of the posting).

5. Click the tab's **Close** button to close the screen.

POS (Point Of Sale) Management

POS Setup

- [Manage POS Options \(see page 93\)](#)

POS Management

- [Assign a Drawer to an Employee \(see page 410\)](#)
- [Record a Cash Drop \(see page 411\)](#)
- [Reconcile a Returned Drawer \(see page 413\)](#)
- [Run a Cash Report \(see page 412\)](#)

Assign a Drawer to an Employee

1. Navigate to the **Assign Drawer** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **POS Management > Assign Drawer** from the main menu to display the **Assign Drawer** screen.

A screenshot of the 'Assign Drawer' screen. The title 'Assign Drawer' is at the top in blue. Below it is the date 'Date: Wednesday, February 19, 2014 12:36 PM'. There are two input fields: 'Employee:' with a dropdown menu and 'Drawer Amount Issued:' with a text box containing the number '0'. Below these are 'Signature' and 'POS Position:' with a dropdown menu. A 'Submit and Print' button is centered below the form fields. Below the form is a grid of six document thumbnails. Each thumbnail is a 'Cash Drop - POS Position' document for the date 2/19/2014. The first column contains the original document with a signature line and a barcode. The second column contains a '(management copy)' of the same document with a barcode. The grid is arranged in three rows and two columns.

2. Select the employee from the **Employee** drop-down field.
3. Enter the amount of cash in the drawer in the **Drawer Amount Issued** field.
4. Select the point of sale position from the **POS Position** drop-down field.
5. Click the **Submit and Print** button to send the document to a printer.
6. Click the tab's **Close** button to close the screen.

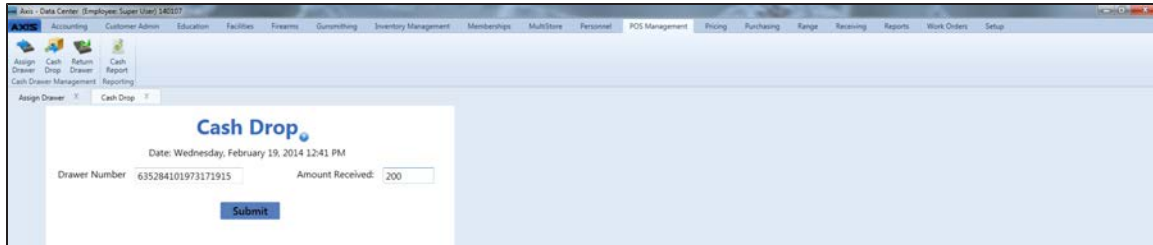
Record a Cash Drop

1. Navigate to the **Cash Drop** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **POS Management > Cash Drop** from the main menu to display the **Cash Drop** screen.



2. Scan or enter the barcode value from the cash drop receipt in the **Drawer Number** field.
3. Enter the amount of cash received in the **Amount Received** field.
4. Click the **Submit** button to close the screen.

Run a Cash Report

1. Navigate to the **Point of Sale Cash Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **POS Management > Cash Report** from the main menu to display the **Point of Sale Cash Report** screen.



2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

Reconcile a Returned Drawer

1. Navigate to the **Drawer Reconciliation** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **POS Management > Return Drawer** from the main menu to display the **Drawer Reconciliation** screen.

Drawer Reconciliation ?

Date: Wednesday, February 19, 2014 12:44:27 PM
Employee: POS Position:

Cash Drawer #: Submit

Currency Count		Coin Count		Checks	
\$100	<input type="text" value="0"/>	Dollar	<input type="text" value="0"/>	Total	<input type="text" value="0"/>
\$50	<input type="text" value="0"/>	Half	<input type="text" value="0"/>		
\$20	<input type="text" value="0"/>	Quarter	<input type="text" value="0"/>		
\$10	<input type="text" value="0"/>	Dime	<input type="text" value="0"/>		
\$5	<input type="text" value="0"/>	Nickel	<input type="text" value="0"/>		
\$1	<input type="text" value="0"/>	Penny	<input type="text" value="0"/>	Total	0.00

Reconcile

System Counts	Amount Counted in Drawer	Over/Short
+ Start Amount	\$0.00	
+ Cash Sales	\$0.00	
- Cash Refunds	\$0.00	
- Cash Drops	\$0.00	
- Paid Out Cash	\$0.00	
= Cash In Drawer	\$0.00	
Checks	\$0.00	
	Cash	\$0.00
	Checks	\$0.00
Total: (+cash sales -cash refunds - cash paid out +checks)		\$0.00
Signature _____		

Submit and Print

2. Scan or enter the barcode value from the drawer assignment sheet in the **Cash Drawer #** field.
3. Enter the counted number of each type of bill in the **Currency Count** fields.
4. Enter the counted number of each type of coin in the **Coin Count** fields.
5. Enter the combined total amount of checks in the **Checks Total** field.
6. Click the **Submit** button to add **Cash** and **Checks** amounts to the **Amount Counted in Drawer** column.
7. Click the **Reconcile** button to add **Cash Short** and **Checks Over** amounts to the **Over/Short** column.
8. Click the **Submit and Print** button to send the document to a printer.
9. Click the tab's **Close** button to close the screen.

Work Order Administration

This section contains procedures to create, edit, update (with detail or product components), print, and complete standard (non-serialized) and gunsmithing (serialized) work orders.

Standard Work Orders

Standard Work Orders are used to document custom work that does not involve firearms and will not require creation or modification of acquisition and disposition records.

- [Create a Work Order \(non-firearm\) \(see page 416\)](#)
- [Update an Open Work Order \(non-firearm\) \(see page 417\)](#)
- [View and Print Delivered Work Orders \(non-firearm\) \(see page 419\)](#)

Gunsmithing Work Orders

Gunsmithing Work Orders are used to document custom work involving firearms and will create/modify acquisition and disposition records.

- [Create a Gunsmithing Work Order \(see page 420\)](#)
- [Update an Open Gunsmithing Work Order \(see page 421\)](#)
- [View and Print Delivered Gunsmithing Work Orders \(see page 425\)](#)

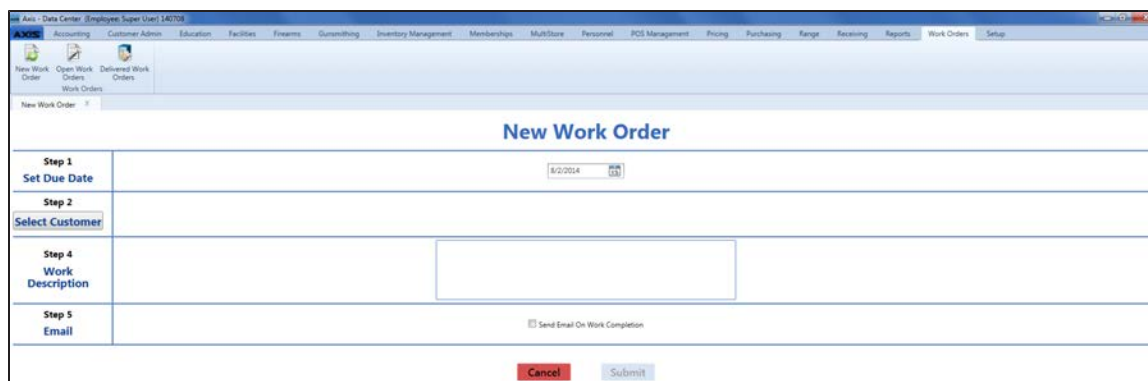
Create a Work Order (non-firearm)

1. Navigate to the **New Work Order** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Work Orders > New Work Order** from the main menu to display the **New Work Order** screen.

A screenshot of the 'New Work Order' screen. The screen title is 'New Work Order'. It features a multi-step form with the following sections:

- Step 1 Set Due Date:** A date field containing '8/2/2014' and a calendar icon.
- Step 2 Select Customer:** A button labeled 'Select Customer'.
- Step 4 Work Description:** A large text input field.
- Step 5 Email:** A checkbox labeled 'Send Email On Work Completion'.

At the bottom of the form are 'Cancel' and 'Submit' buttons.

2. Enter the due date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Due Date** field.
3. Click the **Select Customer** button to display the **Customer Look-up** window.
4. [Select or Add a Firearm Customer \(see page 29\)](#) to add the customer to the screen.
5. Enter descriptive text in the **Work Description** field.
6. Check the **Send Email On Work Completion** checkbox.

Note: If the selected customer does not have an email address on file, an information window appears. Click the **Continue** button to close the window .

7. Click the **Submit** button to display a confirmation window .
8. Click the **Close** button to close the screen.

Update an Open Work Order (non-firearm)

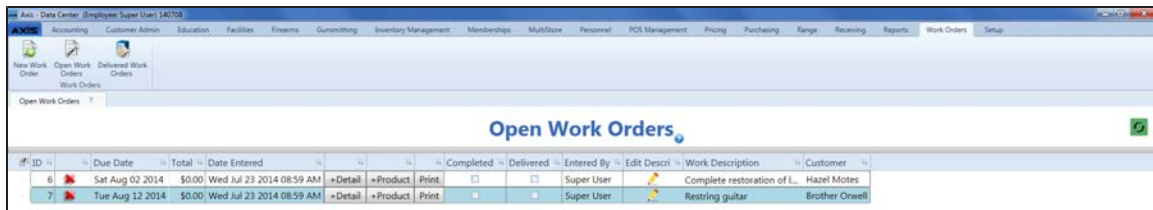
1. Navigate to the **Open Work Orders** screen.

Note: If a work order's **Due Date** is today, tomorrow, or any day in the past, the system displays it in red.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Work Orders > Open Work Orders** from the main menu to display the **Open Work Orders** screen.



2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedures as appropriate to update work orders:

Edit a Work Order's Description

1. Click a work order's **Edit** button to display its **Edit the work order description** window.
2. Edit the text in the field.
3. Click the **OK** button to display the edited description on the **Open Work Orders** screen.

Print an Open Work Order

1. Click a work order's **Print** button to display a **Save As** window.
2. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the work order.

Add a Detail to a Work Order

1. Click a work order's **Detail** button to display its **Work Order Detail** window.
2. Enter descriptive text in the **Description** field.
3. Enter the cost in the **Cost** field.
4. Click the **Submit** button.

Add a Product to a Work Order

1. Click a work order's **Product** button to display the **Product Search** window.
 2. [Select a Single Product \(see page 27\)](#) to add it to the work order.
 3. Repeat steps as needed to add additional products to the work order.
-

Edit a Detail or Product in a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
2. Click a detail/product's **Edit** button to display its **Work Order Detail** window.
3. Edit the text in the **Description** field.
4. Edit the cost in the **Cost** field.
5. Click the **Submit** button to display the edited information on the component record.
6. Click the work order's **Contract (-)** button to close its component record.

Remove a Detail or Product from a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
2. Click a detail/product's **Delete** button to display a deletion confirmation window.
3. Click the **Yes** button to remove the detail/product from the component record.
4. Click the work order's **Contract (-)** button to close its component record.

Complete a Detail or Product in a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
2. Check a detail/product's **Completed** checkbox to display a completion confirmation window.
3. Click the **Yes** button to display a check mark in the detail/product's **Completed** checkbox.
4. Click the work order's **Contract (-)** button to close its component record.

Complete an Open Work Order

Note: If a work order includes details and/or products in its component record, each of these must be individually marked "Completed" before the entire work order can be completed. Refer to [Complete a Detail or Product in a Work Order](#) for more information.

1. Click a work order's **Completed** checkbox to display a completion confirmation window.
2. Click the **Yes** button to display a check mark in the work order's **Completed** checkbox.

Note: This procedure allows the work order to be received and paid for in the **Register** application.

Delete a Work Order

1. Click a work order's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the work order from the **Open Work Orders** screen.

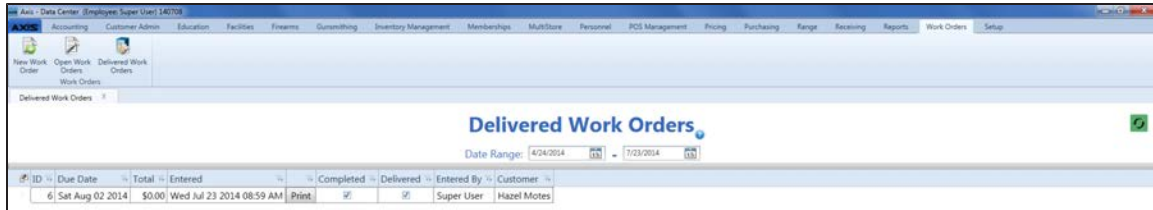
4. Click the tab's **Close** button to close the screen.

View and Print Delivered Work Orders (non-firearm)

1. Navigate to the **Delivered Work Orders** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Work Orders > Delivered Work Orders** from the main menu to display the **Delivered Work Orders** screen.
3. Enter starting and ending dates in the **Date Range** fields and press the **Enter** key to display results from that time frame.



2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedures as appropriate to update work orders:

View a Work Order's Detail/Product Record

1. Click the work order's **Expand (+)** button to display its component record.
2. Click the work order's **Contract (-)** button to close its component record.

Print a Delivered Work Order

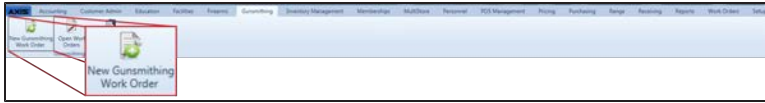
1. Click a work order's **Print** button to display a **Save As** window.
2. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the work order.

4. Click the tab's **Close** button to close the screen.

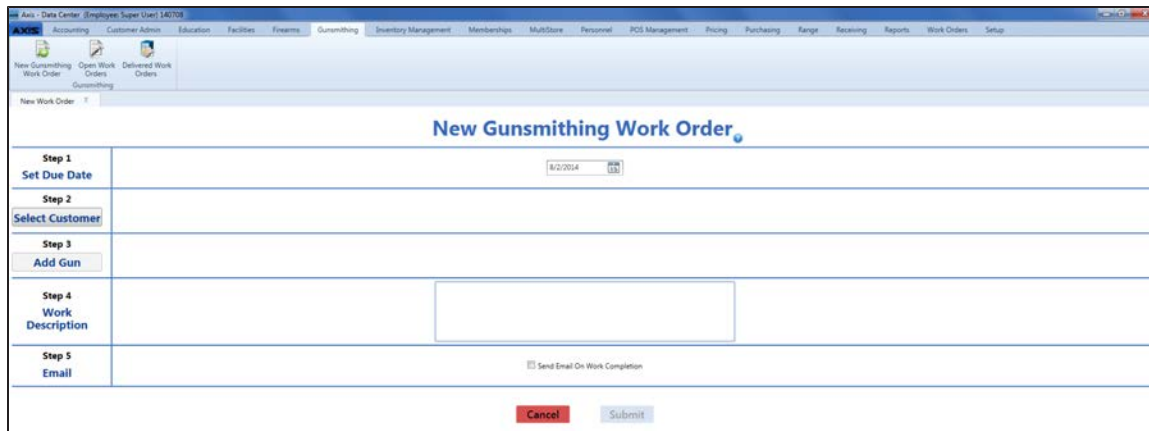
Create a Gunsmithing Work Order

1. Navigate to the **New Gunsmithing Work Order** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Gunsmithing > New Gunsmithing Work Order** from the main menu to display the **New Gunsmithing Work Order** screen.

A screenshot of the 'New Gunsmithing Work Order' screen. The screen has a blue header with the title 'New Gunsmithing Work Order'. Below the header is a table with five steps: Step 1: Set Due Date (with a date field showing 8/2/2014 and a calendar icon), Step 2: Select Customer (with a 'Select Customer' button), Step 3: Add Gun (with an 'Add Gun' button), Step 4: Work Description (with a large text input field), and Step 5: Email (with a 'Send Email On Work Completion' checkbox). At the bottom of the screen are 'Cancel' and 'Submit' buttons.

2. Enter the due date (mm/dd/yyyy) or [Select a Date \(see page 24\)](#) with the calendar button in the **Set Due Date** field.

3. Click the **Select Customer** button to display the **Customer Look-up** window.

4. [Select or Add a Firearm Customer \(see page 29\)](#) to add the customer to the screen.

5. Click the **Add Gun** button to display the **Firearm Description** window.

6. [Describe a Firearm \(see page 37\)](#) to add it to the screen. (Repeat steps as needed to add additional firearms to the screen.)

7. Enter descriptive text in the **Work Description** field.

8. Check the **Send Email On Work Completion** checkbox.

Note: If the selected customer does not have an email address on file, an information screen appears. Click the **Continue** button to close the screen.

9. Click the **Submit** button to display a confirmation window.

Note: This procedure updates the Gunsmith Bound Book with the acquisition of the identified firearm (s).

10. Click the **Close** button to close the screen.

Update an Open Gunsmithing Work Order

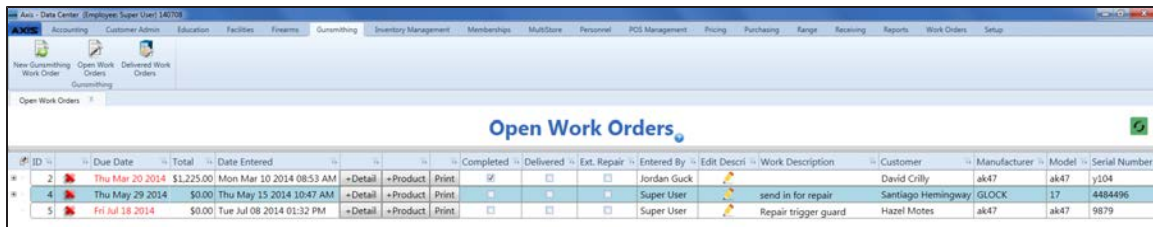
1. Navigate to the **Open Work Orders** (gunsmithing) screen.

Note: If a work order's **Due Date** is today, tomorrow, or any day in the past, the system displays it in red.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Gunsmithing > Open Work Orders** from the main menu to display the **Open Work Orders** screen.



ID	Due Date	Total	Date Entered	Completed	Delivered	Ext. Repair	Entered By	Edit Descri	Work Description	Customer	Manufacturer	Model	Serial Number
2	Thu Mar 20 2014	\$1,225.00	Mon Mar 10 2014 08:53 AM				Jordan Guck			David Crilly	ak47	ak47	y104
4	Thu May 29 2014	\$0.00	Thu May 15 2014 10:47 AM				Super User		send in for repair	Santiago Hemingway	GLOCK	17	4884696
5	Fri Jul 18 2014	\$0.00	Tue Jul 08 2014 01:32 PM				Super User		Repair trigger guard	Hazel Motes	ak47	ak47	9879

2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedures as appropriate to update gunsmithing work orders:

Edit a Work Order's Description

1. Click a work order's **Edit** button to display its **Edit the work order description** window.
2. Edit the text in the field.
3. Click the **OK** button to display the edited description on the **Open Work Orders** screen.

Print an Open Work Order

1. Click a work order's **Print** button to display a **Save As** window.
2. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the work order.

Send a Work Order Firearm for External Repair

1. Check a work order's **Ext. Repair** checkbox to display a vendor selection notice window.
2. Click the **OK** button to display the **Vendor Look-up** window.
3. [Select a Firearm Vendor \(see page 32\)](#) to display a check mark in the work order's **Ext. Repair** checkbox.

Note: This procedure records the disposition of the firearm to the selected vendor in the Gunsmith Bound Book. Refer to [Manage a Bound Book \(see page 224\)](#) to view this disposition and locate its Log #.

4. Record the disposition of the firearm as a detail in the work order's component record. Refer to [Add a Detail to a Work Order](#) for more information.

Note: Include all pertinent information in the detail **Description**. For example, " Firearm was shipped to <vendor> for repair on <date>; Gunsmith Bound Book Log <number>."

Receive a Work Order Firearm from External Repair

1. Uncheck a work order's **Ext. Repair** checkbox to display a firearm confirmation window.
2. Click the **Yes** button to display the **Vendor Information** window.
3. Click the **Submit** button to close the window and remove the check mark from the work order's **Ext. Repair** checkbox.

Note: This procedure records the acquisition the firearm from the vendor in the Gunsmith Bound Book. Refer to [Manage a Bound Book \(see page 224\)](#) to view this acquisition and locate its Log #.

4. Record the acquisition of the firearm as a detail in the work order's component record. Refer to [Add a Detail to a Work Order](#) for more information.

Note: Include all pertinent information in the detail **Description**. For example, " Firearm was received from <vendor> on <date>; Gunsmith Bound Book Log <number>."

Add a Detail to a Work Order

1. Click a work order's **Detail** button to display its **Work Order Detail** window.
 2. Enter descriptive text in the **Description** field.
 3. Enter the cost in the **Cost** field.
 4. Click the **Submit** button.
-

Add a Product to a Work Order

1. Click a work order's **Product** button to display the **Product Search** window.
2. [Select a Single Product \(see page 27\)](#) to add it to the work order.

Note: Serialized products may not be added to the work order.

3. Repeat steps as needed to add additional products to the work order.

Edit a Detail or Product in a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
2. Click a detail/product's **Edit** button to display its **Work Order Detail** window.
3. Edit the text in the **Description** field.
4. Edit the cost in the **Cost** field.
5. Click the **Submit** button to display the edited information on the component record.
6. Click the work order's **Contract (-)** button to close its component record.

Remove a Detail or Product from a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
2. Click a detail/product's **Delete** button to display a deletion confirmation window.
3. Click the **Yes** button to remove the detail/product from the component record.
4. Click the work order's **Contract (-)** button to close its component record.

Complete a Detail or Product in a Work Order

1. Click the work order's **Expand (+)** button to display its component record.
 2. Check a detail/product's **Completed** checkbox to display a completion confirmation window.
 3. Click the **Yes** button to display a check mark in the detail/product's **Completed** checkbox.
 4. Click the work order's **Contract (-)** button to close its component record.
-

Complete an Open Work Order

Note: If a work order includes details and/or products in its component record, each of these must be individually marked "Completed" before the entire work order can be completed. Refer to [Complete a Detail or Product in a Work Order](#) for more information.

1. Click a work order's **Completed** checkbox to display a completion confirmation window.
2. Click the **Yes** button to display a check mark in the work order's **Completed** checkbox.

Note: This procedure allows the work order to be received and paid for in the **Register** application.

Delete a Work Order

1. Click a work order's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to remove the work order from the **Open Work Orders** screen.

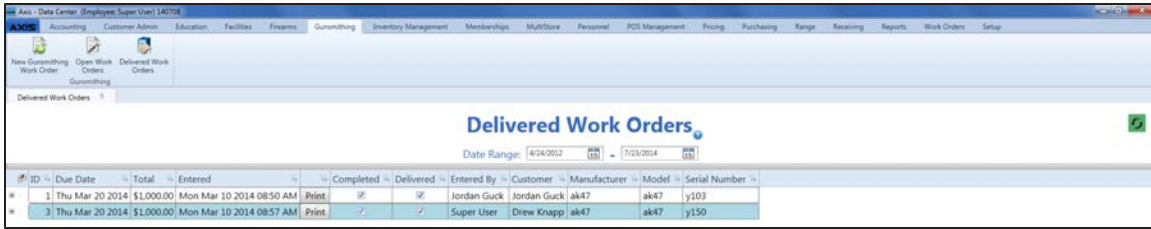
-
4. Click the tab's **Close** button to close the screen.

View and Print Delivered Gunsmithing Work Orders

1. Navigate to the **Delivered Work Orders** (gunsmithing) screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Gunsmithing > Delivered Work Orders** from the main menu to display the **Delivered Work Orders** screen.
3. Enter starting and ending dates in the **Date Range** fields and press the **Enter** key to display results from that time frame.



2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedures as appropriate to update work orders:

View a Work Order's Detail/Product Record

1. Click the work order's **Expand (+)** button to display its component record.
2. Click the work order's **Contract (-)** button to close its component record.

Print a Delivered Work Order

1. Click a work order's **Print** button to display a **Save As** window.
2. [Save and Print a Document \(see page 48\)](#) to create electronic and hardcopy versions of the work order.

4. Click the tab's **Close** button to close the screen.

Report Administration

This section contains procedures to generate and view a variety of reports and lists to assist in daily, monthly, annual, performance, and Bound Book reporting.

- [View the 12 Month Sales Report \(see page 429\)](#)
- [View the 80/20 Sales Report \(see page 430\)](#)
- [View the ATF Used Gun Report \(see page 431\)](#)
- [View the Daily Info Report \(see page 432\)](#)

The Daily Info Report lists sales from a specific date and includes tax totals and amounts of media taken in at each register by Cash, Check, Visa, Master Card, American Express, Discover, Gift Cards, AR Accounts and other cards.

- [View the Daily Register Report \(see page 434\)](#)

The Daily Register Report displays total sales and tax from each register.

- [View the Daily Sales Report \(see page 435\)](#)

The Daily Sales Report shows the transaction count, total sales, total taxes, and average transaction amount for any given date or range of dates.

- [View the General Ledger Report \(see page 436\)](#)
- [Manage the Gift Card List \(see page 437\)](#)

The Gift Card List displays the existing balances of all outstanding gift cards as well as individual purchases and uses.

- [View Historic Product Levels \(see page 440\)](#)
- [View the Inventory Turns Report \(see page 441\)](#)
- [View the Items Out of Stock Report \(see page 442\)](#)

The Items Out of Stock Report provides a list of items that were out of stock for a day or more during a selected 31-day time period.

- [View the Items Sold Report \(see page 433\)](#)
- [View the Item Variance Report \(see page 444\)](#)
- [View the Layaway Report \(see page 446\)](#)

The Layaway Report displays payment details for all customer layaways.

- [View the Layaway By Item Report \(see page 445\)](#)

The Layaway By Item Report displays every item on layaway with the customer's name for verifying layaway inventory.

- [View the Audit Log \(see page 447\)](#)
- [View the Quantity on Hand Report \(see page 448\)](#)

The Quantity on Hand Report displays the QOH for a specified date range.

- [View the Receiving Reconciliation Report \(see page 449\)](#)
- [View the Sales by Sales Associate Report \(see page 450\)](#)

The Sales By Sales Associate Report provides a record of every sales associate (logged in user) who completed or received credit for the sale of an item, every sale for which the associate received credit, and the Gross Profit for each sale expressed in dollars (**GP \$**) and percentage (**GP %**).

- [View the Sales Item Report \(see page 452\)](#)

The Sales Item Report lists all items sold and payments received within a specified date range.

- [View the Sales Tax Report \(see page 453\)](#)

The Sales Tax Report shows sales (including taxable sales, nontaxable sales, sales tax refunds, and nontaxable sales refunds) and taxes collected for every defined tax type for a specified date range.

- [View the Value On Hand Report \(see page 454\)](#)

The Value On Hand Report provides a record of the quantity, total costs, and total value for every item in inventory.

- [View the Vendor Reorder Report \(see page 455\)](#)

The Vendor Reorder Report provides a list of items that have fallen below their minimum inventory levels and should probably be reordered.

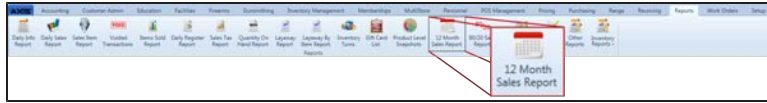
- [View the Voided Transactions Report \(see page 456\)](#)

- [View the Waiting Period Report \(see page 457\)](#)

View the 12 Month Sales Report

1. Navigate to the **12 Month Sales Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > 12 Month Sales Report** from the main menu to display the **12 Month Sales Report** screen.

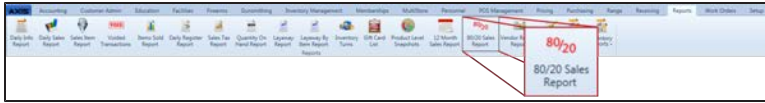
MPN	Description	Manufacturer	Department	Item	Price	On Order	12 Month	YTD
000012340000	TEST GUN G	TEST	TEST	TEST	\$850.00	0	0	2
01152719124	TEST FIREARM A	COLT	FIREARMS	PISTOL	\$850.00	0	0	1
600000000005	TestMembership	STORE	MEMBERSHIPS	MEMBERSHIP	\$50.00	0	0	1
Total 3								
Quantity	0	0	0	0	0	0	0	4
EstM Quantity	0	0	0	0	0	0	0	0
PI Quantity	0	0	0	0	0	0	0	0
Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$1,700.00	\$0.00	\$0.00	\$1,700.00
Markdowns	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales	\$0.00	\$0.00	\$0.00	\$0.00	\$1,700.00	\$0.00	\$0.00	\$1,700.00

2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Check the **Include Products With No Sales** checkbox to display all products.
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

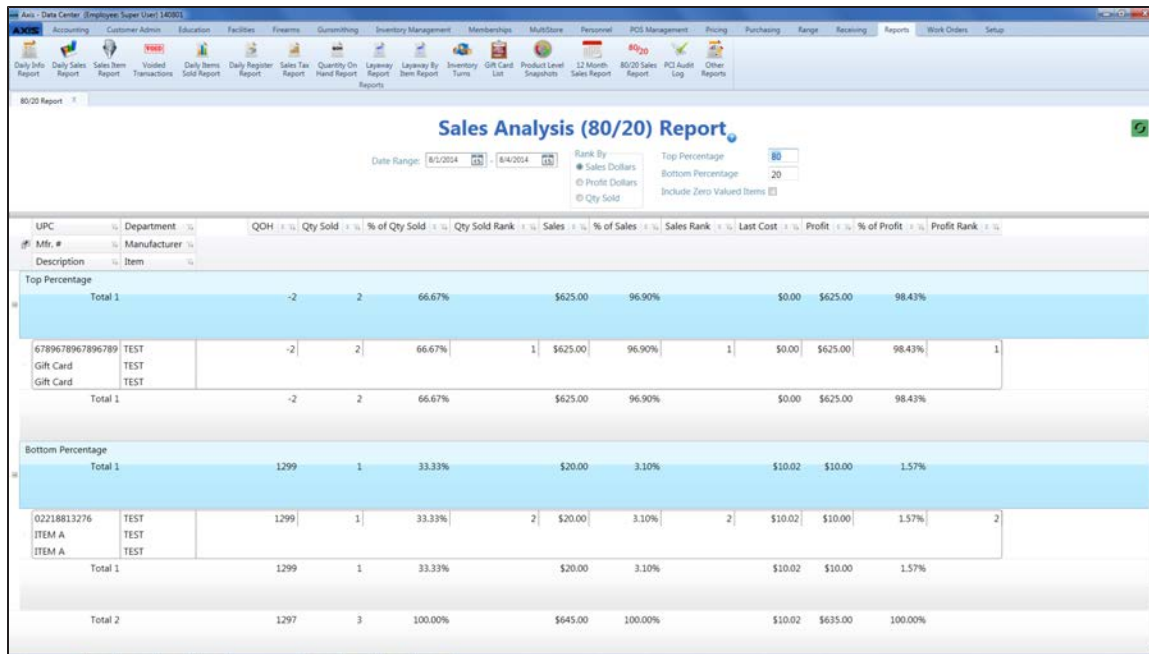
View the 80/20 Sales Report

1. Navigate to the **Sales Analysis (80/20) Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > 80/20 Sales Report** from the main menu to display the **Sales Analysis (80/20) Report** screen.



2. Enter starting and ending dates in the **Date Range** fields.

3. Click the desired **Rank By** selection button:

- **Sales Dollars:** Select to rank items by sales measured in dollars.
- **Profit Dollars:** Select to rank items by profit measured in dollars.
- **Qty Sold:** Select to rank items by number of items sold.

4. If desired, modify the percentages in the **Top Percentage** and **Bottom Percentage** fields.

Note: When a value is entered in one of these fields, the system automatically populates the other field so they total 100 percent.

5. If needed, check the **Include Zero Valued Items** checkbox to include all items in calculations.

6. Click the **Refresh** button to display results for selected options.

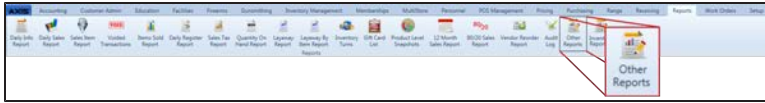
7. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

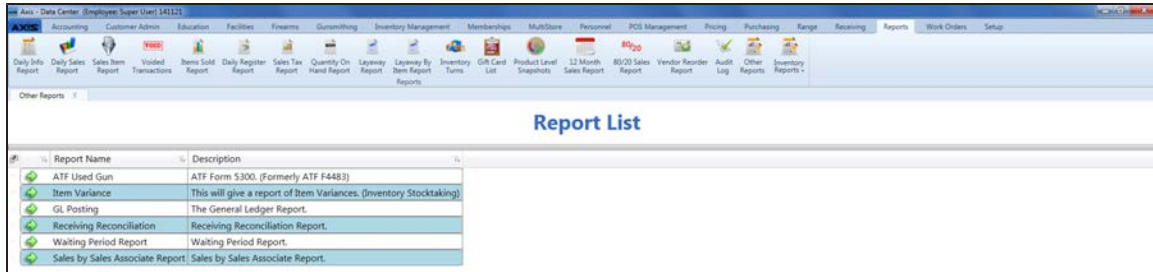
8. Click the tab's **Close** button to close the screen.

View the ATF Used Gun Report

1. Navigate to the **Report List** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **ATF Used Gun** report to display the report in the **Report Viewer** window.
3. Complete the following procedure to set parameters for the report:
 1. Click the **Parameters** button to display parameter controls.
 2. Enter/select report criteria in the fields as needed.
 3. Click the **Submit** button.
 4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and/or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

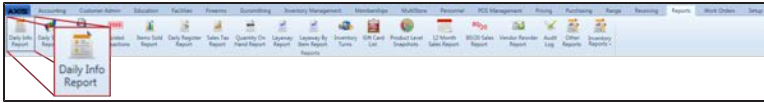
1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

6. Click the **Close** button to close the **Report Viewer** window.
7. Click the tab's **Close** button to close the screen.

View the Daily Info Report

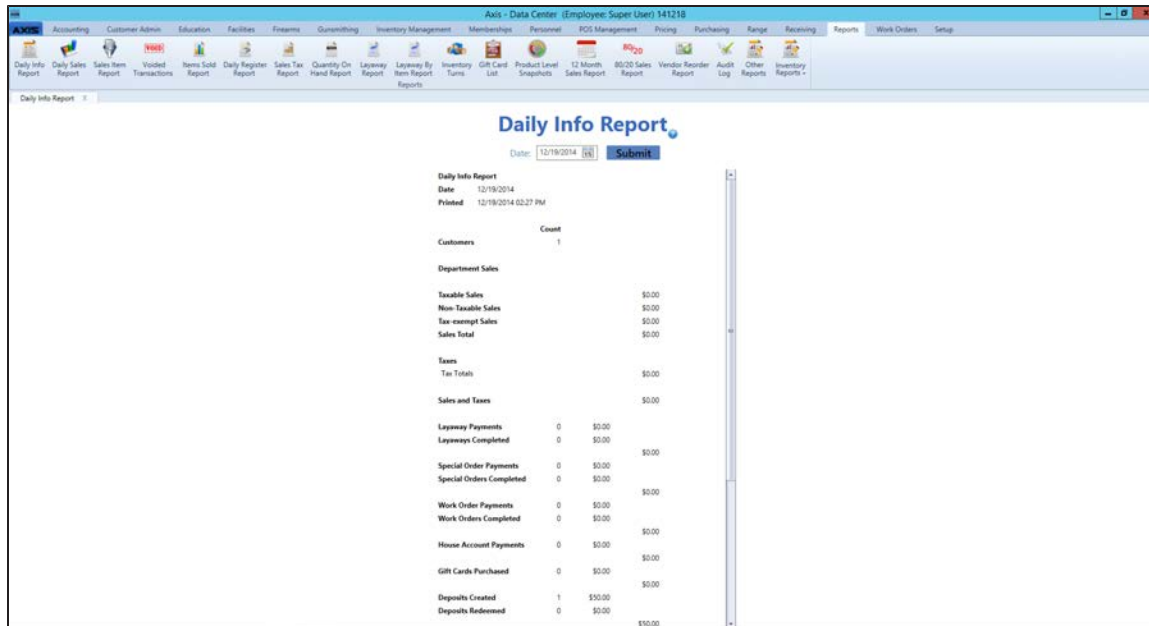
1. Navigate to the **Daily Info Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Daily Info Report** from the main menu to display the **Daily Info Report** screen.

3. Enter the desired date in the **Date** field and click the **Submit** button to display the report for the entered date.



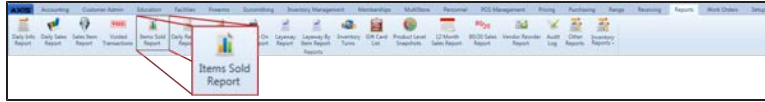
2. Click the tab's **Close** button to close the screen.

View the Items Sold Report

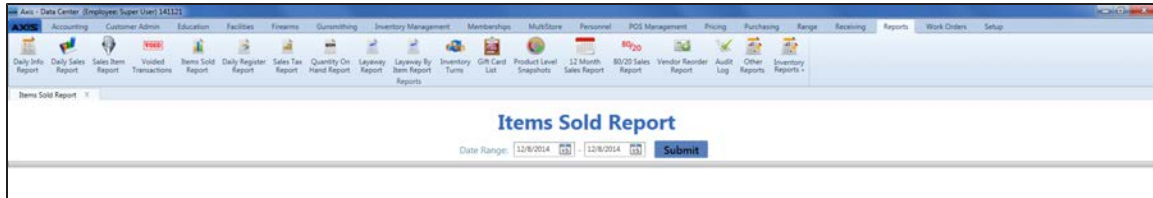
Complete the following procedure to generate and view a record of items that were sold during a selected time period.

1. Navigate to the **Items Sold Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Items Sold Report** from the main menu to display the **Items Sold Report** screen.



2. Enter starting and ending dates in the **Date Range** fields.

3. Click the **Submit** button to display results from the selected time frame.

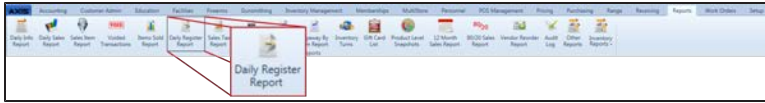
4. [Sort and Filter Onscreen Data \(see page 40\)](#) as needed.

5. Click the tab's **Close** button to close the screen.

View the Daily Register Report

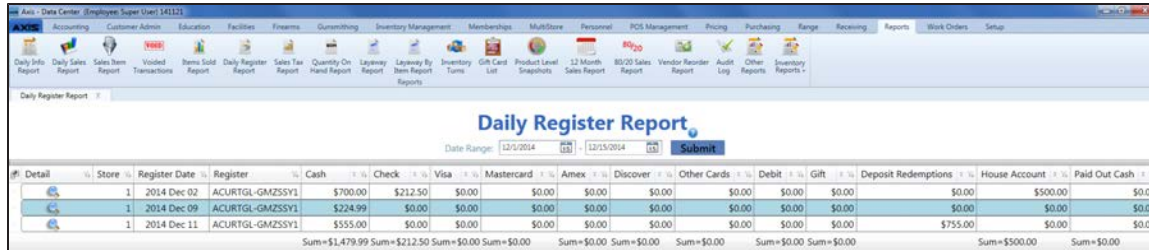
1. Navigate to the **Daily Register Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Daily Register Report** from the main menu to display the **Daily Register Report** screen.

3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).



2. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Complete the following procedure to view details for a specific date:

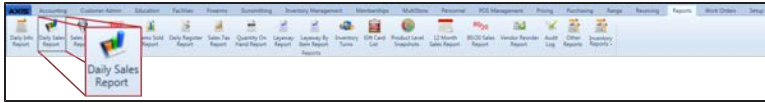
1. Click a date's **View** button to view its **Register Payment Detail** window.
2. Use the scroll bar as needed to view the entire report.
3. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
4. Click the **OK** button to close the window.

4. Click the tab's **Close** button to close the screen.

View the Daily Sales Report

1. Navigate to the **Daily Sales Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Daily Sales Report** from the main menu to display the **Daily Sales Report** screen.

3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).

#	Date	Trxs	Products	Avg Prid/Trx	Avg Trx Amt	Pre-tax Total	Discounts	Taxes	Total	Taxable Sales	Non-Taxable Sales	Tax-Exempt	COGS	Layaway Deposits	Layaways Completed
	2014 Dec 10	0	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	2014 Dec 11	3	14	4.67	\$376.67	\$1,130.00	\$0.00	\$0.00	\$1,130.00	\$0.00	\$1,130.00	\$0.00	\$475.20	\$0.00	\$0.00
	2014 Dec 12	0	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	2014 Dec 13	0	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	2014 Dec 14	0	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	2014 Dec 15	0	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sum = 3		Sum = 14	Avg=0.78	Avg=\$62.78	Sum=\$1,130.00	Sum=\$0.00	Sum=\$0.00	Sum=\$1,130.00	Sum=\$0.00	Sum=\$1,130.00	Sum=\$0.00	Sum=\$0.00	Sum=\$475.20	Sum=\$0.00	Sum=\$0.00

2. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Complete the following procedure to view details for a specific date:

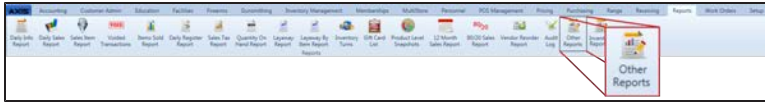
1. Click a date to view its **Daily Sales Detail** window.
2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the **OK** button to close the window.

4. Click the tab's **Close** button to close the screen.

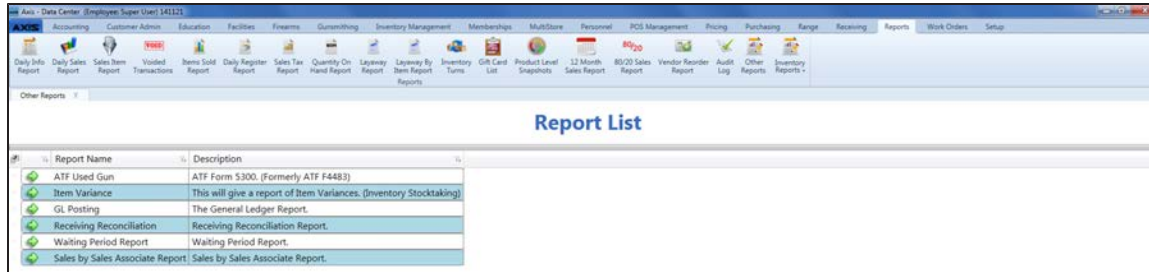
View the General Ledger Report

1. Navigate to the **Report List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **GL Posting** report to display the report in the **Report Viewer** window.
3. Complete the following procedure to set parameters for the report:
 1. Click the **Parameters** button to display parameter controls.
 2. Enter/select report criteria in the fields as needed.
 3. Click the **Submit** button.
 4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

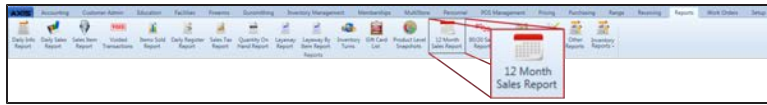
1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

-
6. Click the **Close** button to close the **Report Viewer** window.
 7. Click the tab's **Close** button to close the screen.

Manage the Gift Card List

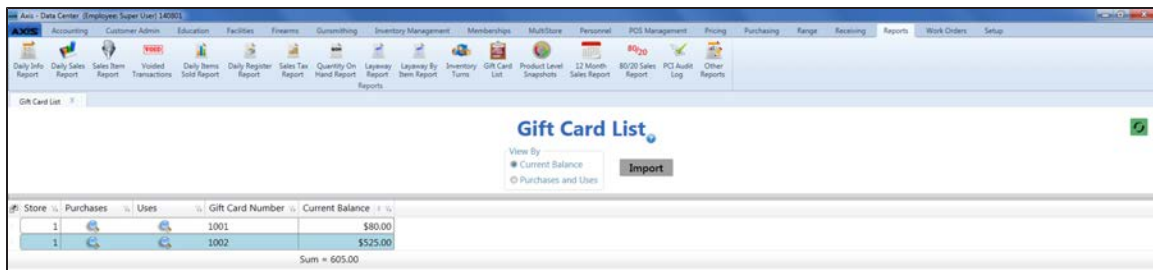
1. Navigate to the **Gift Card List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Gift Card List** from the main menu to display the **Gift Card List** screen.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).



2. Complete the following procedures as needed to manage gift card data:

Note: A "purchase" occurs whenever money is added to a gift card, whether during the initial sale of the card or at a later time. A "use" occurs whenever money is removed from the card.

View All Gift Card Purchases and Uses

1. Click the **Purchases and Uses** selection button to display the purchases and uses report.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

2. Click the **Current Balance** selection button to display the standard gift card balance report.

View a Specific Card's Purchases

1. Click a gift card's **Purchases** button to view its **Gift Card Purchases** window.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

2. Click the **Close** button to close the window.

View a Specific Gift Card's Uses

1. Click a gift card's **Uses** button to view its **Gift Card Uses** window.

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

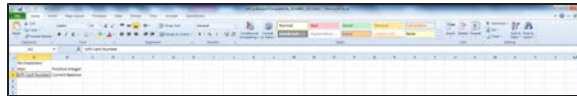
2. Click the **Close** button to close the window.

Import Gift Card Data

1. Right-click on the list to display a menu of options.



2. Click the **Export Template** option to export the template format to an Excel file.



3. Populate the Excel file with gift card information.

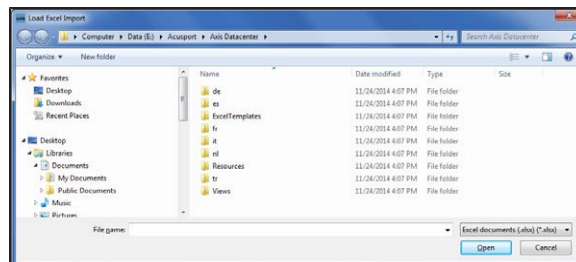
Note: The file must adhere to the validation requirements indicated in row 1 and below:

- No entry may have the same value for **Gift Card Number** as any other entry in this file or already in the system.
- **Current Balance** must be a positive integer.

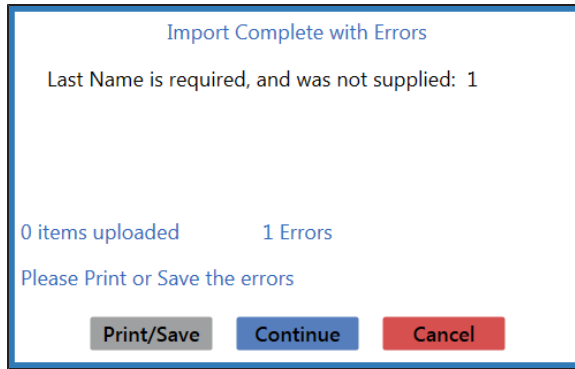
4. Save the Excel file.



5. Click the **Import** button on the **Gift Card List** screen to display the **Load Excel Import** window.

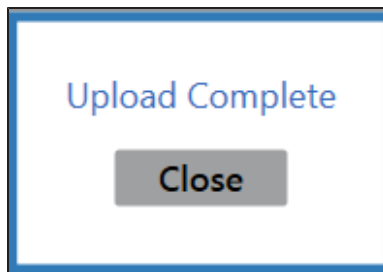


6. Browse to the desired location.
7. Double-click the saved Excel file to select it and start the import process.
8. If the system detects any errors, it displays the **Import Complete with Errors** window.



Complete any of the following as needed:

- Click the **Print/Save** button to display the errors in a formatted template file that may be manually printed and/or saved. Click another button as appropriate to close this window.
 - Click the **Continue** button to continue with the import for the uploaded items.
 - Click the **Cancel** button to cancel the import.
9. When the import is complete, the system displays the **Upload Complete** window.

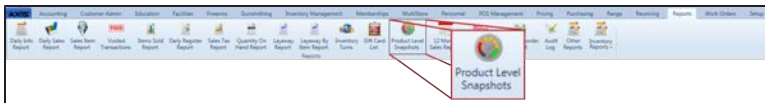


-
3. Click the tab's **Close** button to close the screen.

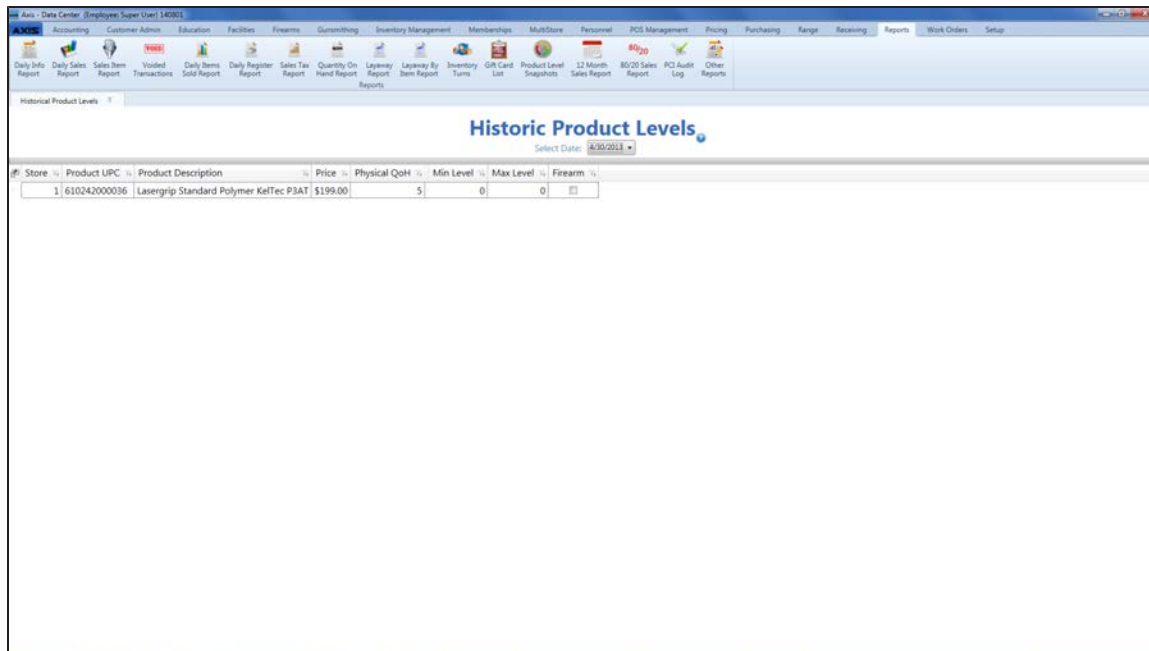
View Historic Product Levels

Note: A Product Level Snapshot provides a Quantity on Hand record for a specific date. The system is scheduled to generate a Product Level Snapshot at the end of every calendar month (either after the close of business on the last day of the month or at the start of the first day of the new month). This snapshot offers inventory valuation and quantities for month-end and may be used as a starting point for generating other reports.

1. Navigate to the **Historic Product Levels** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Product Level Snapshots** from the main menu to display the **Historic Product Levels** screen.
3. Select the desired date from the **Select Date** drop-down field.



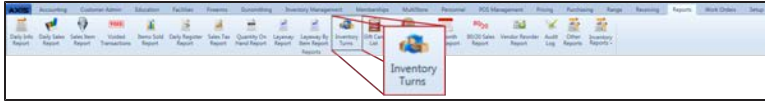
2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

View the Inventory Turns Report

Note: The system requires a minimum of 6 months of sales data to produce an Inventory Turns report.

1. Navigate to the **Inventory Turns** screen.

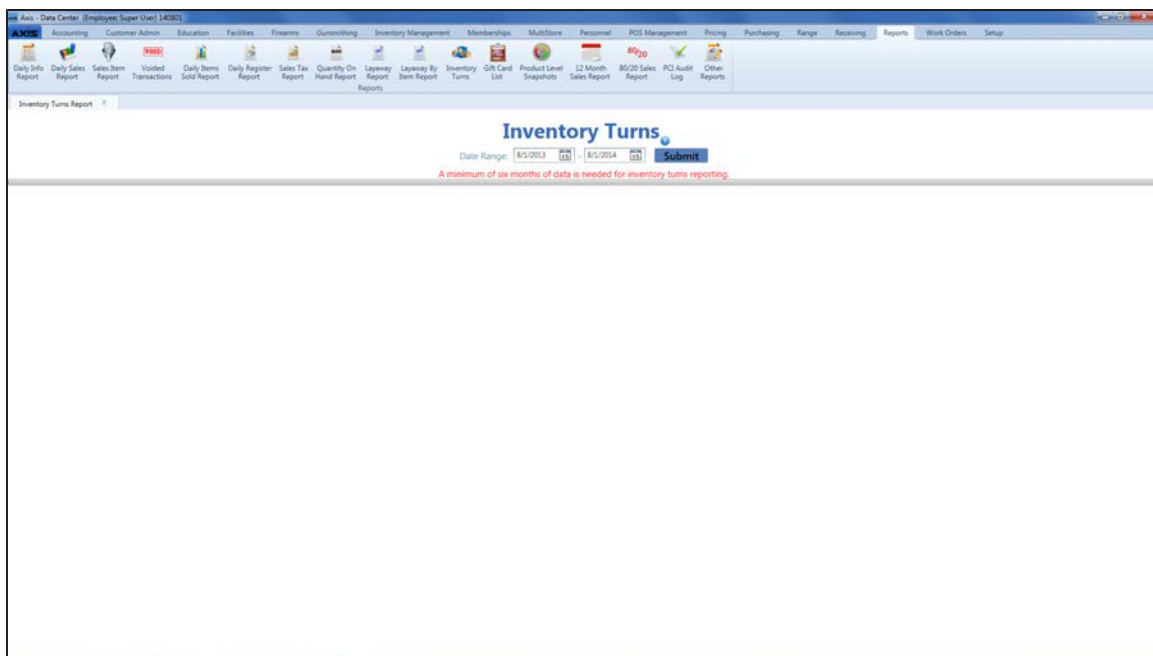
1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Inventory Turns** from the main menu to display the **Inventory Turns** screen.

3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).

Note: If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).

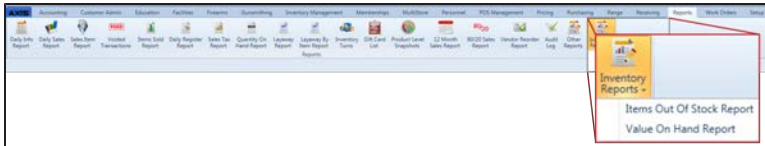


2. Click the tab's **Close** button to close the screen.

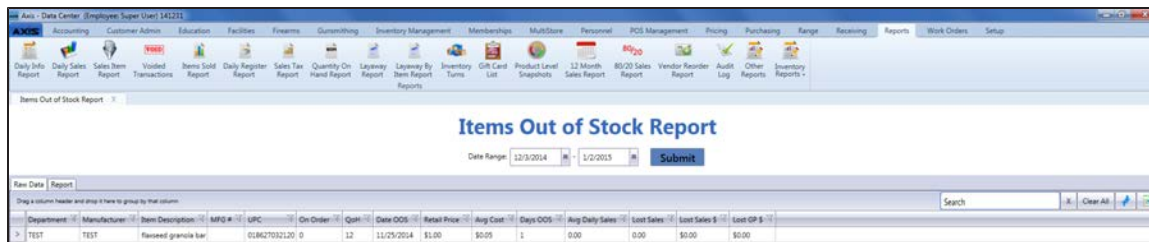
View the Items Out of Stock Report

Complete the following procedure to generate and view a record of items that were out of stock for a day or more during a selected 31-day time period.

1. Navigate to the **Items Out of Stock Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Inventory Reports > Items Out of Stock Report** from the main menu to display the **Items Out of Stock Report** screen.

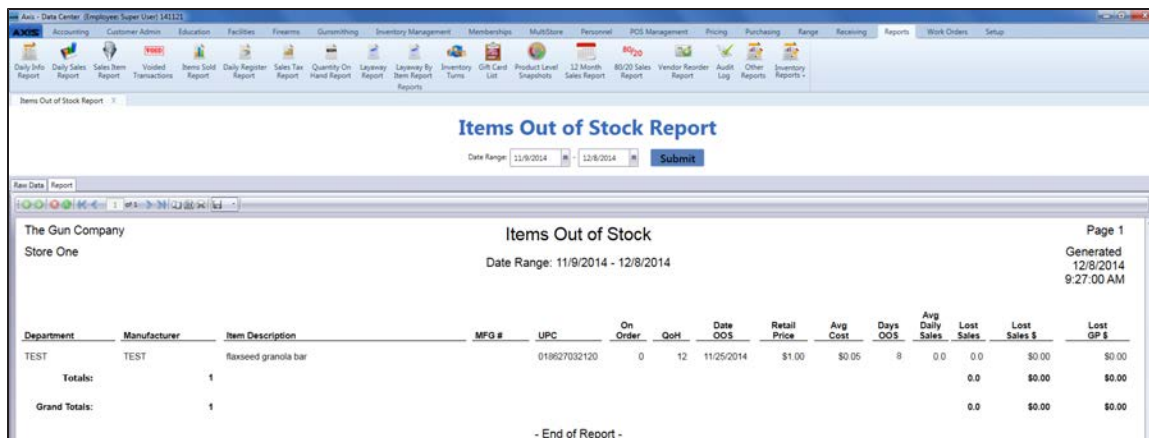


2. Enter starting and ending dates in the **Date Range** fields.

Note: The range must not exceed 31 days.
3. Click the **Submit** button to display results from the selected time frame.

Note: If an item is out of stock for less than an entire day (from midnight to midnight), it will not display in the results.
4. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as needed.
5. Click the **Report** tab to display the report.

Note: The report reflects the filters and controls selected on the **Raw Data** tab.



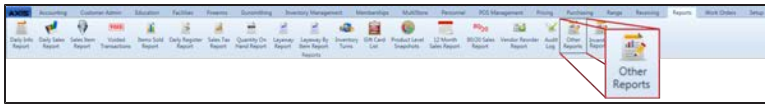
6. If desired, complete the following procedure to print the report:
 1. Click the **Print report** button to display the **Print** window.
 2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
 3. Click the **Print** button to print the document.

7. Click the tab's **Close** button to close the screen.

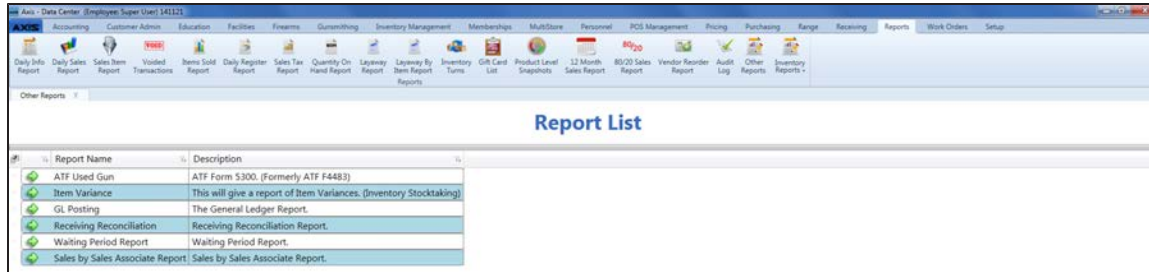
View the Item Variance Report

1. Navigate to the **Report List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **Item Variance** report to display the report in the **Report Viewer** window.
3. Complete the following procedure to set parameters for the report:
 1. Click the **Parameters** button to display parameter controls.
 2. Enter/select report criteria in the fields as needed.
 3. Click the **Submit** button.
 4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

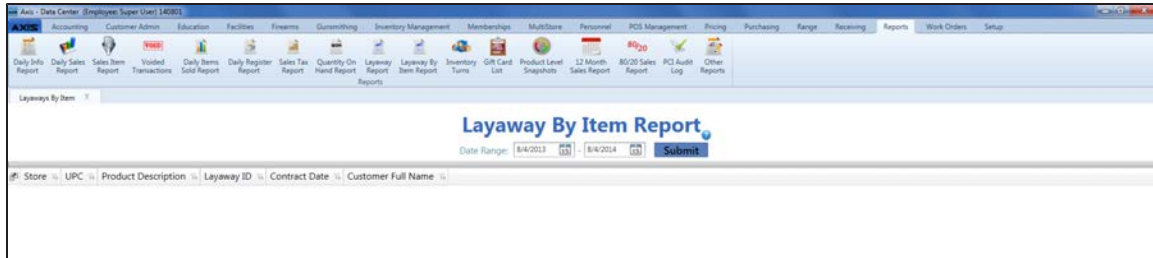
-
6. Click the **Close** button to close the **Report Viewer** window.
 7. Click the tab's **Close** button to close the screen.

View the Layaway By Item Report

1. Navigate to the **Layaway By Item Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Layaway By Item Report** from the main menu to display the **Layaway By Item Report** screen.
3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).



2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

View the Layaway Report

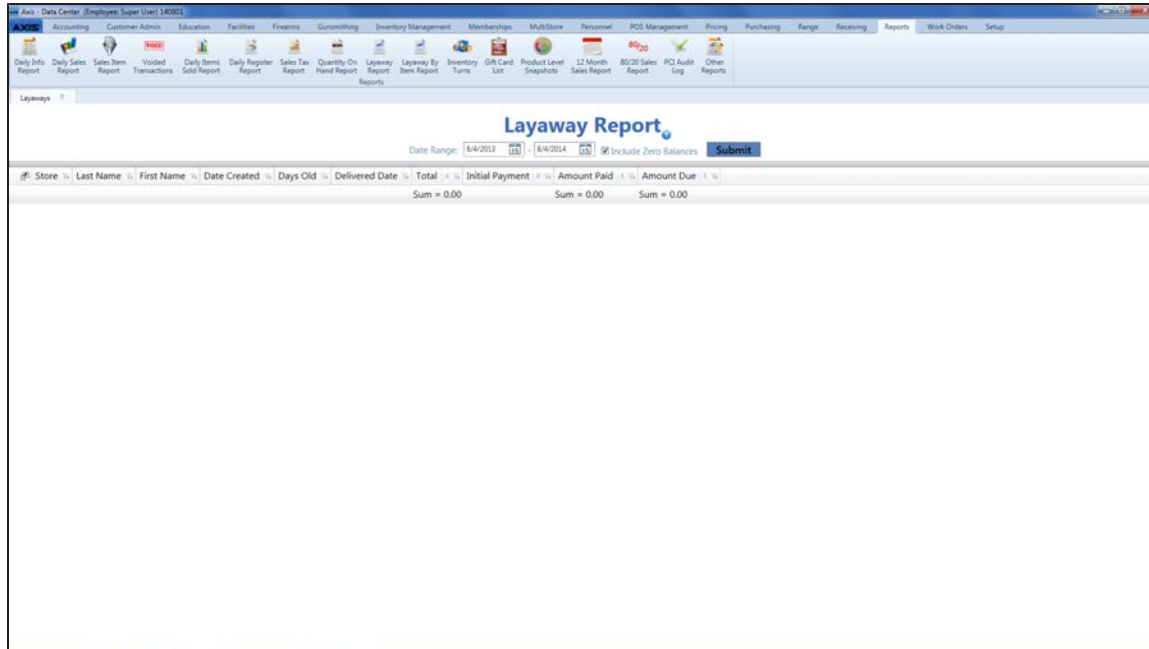
1. Navigate to the **Layaway Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Layaway Report** from the main menu to display the **Layaway Report** screen.

3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).



2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Check the **Include Zero Balances** checkbox and click the **Submit** button to display all layaways.
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedure to view details for a specific layaway:
 1. Click the layaway's **Expand (+)** button to display its component record.
 2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
 3. Click the layaway's **Contract (-)** button to close its component record.
4. Click the tab's **Close** button to close the screen.

View the Audit Log

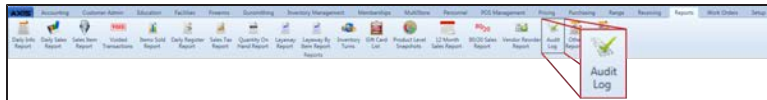
Complete the following procedure to generate and view a record of the following occurrences:

- Login attempts, successful logins, and logouts
- Changes made to Security Management settings
- Changes made to **Last Cost** and **Avg Cost** fields through the **Product Maintenance** screen
- Views of and changes made to the **Credit Card Setup** screen
- Views of the **Audit Log** screen

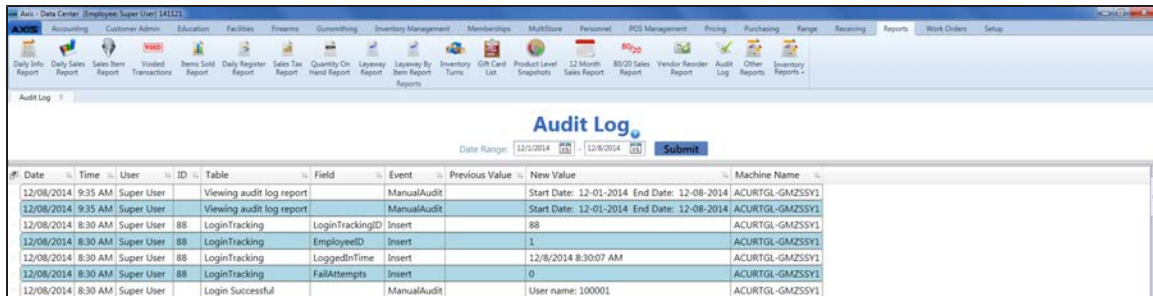
Note: A user must be granted the **AuditLogView** permission to view/use this feature.

1. Navigate to the **Audit Log** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Audit Log** from the main menu to display the **Audit Log** screen.

A screenshot of the Audit Log screen. The top navigation bar is the same as in the previous image. The 'Audit Log' screen has a 'Date Range' field set to '12/01/2014' to '12/08/2014' and a 'Submit' button. Below the date range is a table with the following columns: Date, Time, User, ID, Table, Field, Event, Previous Value, New Value, and Machine Name. The table contains several rows of audit events.

Date	Time	User	ID	Table	Field	Event	Previous Value	New Value	Machine Name
12/08/2014	9:35 AM	Super User		Viewing audit log report		ManualAudit		Start Date: 12-01-2014 End Date: 12-08-2014	ACURTGL-GMZSSV1
12/08/2014	9:35 AM	Super User		Viewing audit log report		ManualAudit		Start Date: 12-01-2014 End Date: 12-08-2014	ACURTGL-GMZSSV1
12/08/2014	8:30 AM	Super User	88	LoginTracking	LoginTrackingID	Insert		88	ACURTGL-GMZSSV1
12/08/2014	8:30 AM	Super User	88	LoginTracking	EmployeeID	Insert		1	ACURTGL-GMZSSV1
12/08/2014	8:30 AM	Super User	88	LoginTracking	LoggedInTime	Insert		12/8/2014 8:30:07 AM	ACURTGL-GMZSSV1
12/08/2014	8:30 AM	Super User	88	LoginTracking	FailAttempts	Insert		0	ACURTGL-GMZSSV1
12/08/2014	8:30 AM	Super User		Login Successful		ManualAudit		User name: 100001	ACURTGL-GMZSSV1

2. Complete any of the following procedures as desired to determine which records are displayed on the screen:

- **Filter by Date:**

Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display results from that time frame.

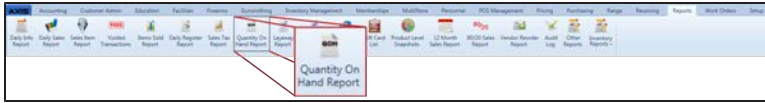
- [Sort and Filter Onscreen Data \(see page 40\)](#).

3. Click the tab's **Close** button to close the screen.

View the Quantity on Hand Report

1. Navigate to the **Quantity on Hand Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Quantity on Hand Report** from the main menu to display the **Quantity on Hand Report** screen.

3. Enter the desired date in the **Date** field and click the **Submit** button to display the report for the entered date.

Store	Product UPC	Product Description	Last Cost	Unvouchered	Physical QoH	Gross Profit	Department	Manufacturer	Item
1	610242000036	Lasergrip Standard Polyme	\$125.00	0	73	0.00%	ACCESSORIES	CRIMSON TRACE	WEAPON LIGHT LASER
1	023614259558	test firearm	\$500.00	0	10	0.00%	FIREARMS	COLT	PISTOL
1	234567891234	10in of wet snow	\$0.00	0	0	0.00%	AMMUNITION	BLACKHAWK	GUNSAFE
1	02218813276	ITEM A	\$10.02	0	1300	49.90%	TEST	TEST	TEST
1	02218813275	ITEM B	\$12.00	0	624	52.00%	TEST	TEST	TEST
1	02218813239	ITEM C	\$12.25	0	500	59.16%	TEST	TEST	TEST
1	02218813238	ITEM D	\$14.00	0	225	53.33%	TEST	TEST	TEST
1	01352719124	TEST FIREARM A	\$750.00	1	66	11.76%	FIREARMS	COLT	PISTOL
1	01352719125	TEST FIREARM B	\$799.00	0	49	11.21%	FIREARMS	COLT	PISTOL
1	624853179123	Test Serialized Item	\$10.00	0	14	50.00%	SERIALIZED ITEMS	ARS	TEST ITEM
1	DAVIDS	DAVIDS	\$10.00	0	0	60.00%	TEST	TEST	TEST
1	000012340000	TEST GLN c	\$850.00	0	-1	0.00%	TEST	TEST	TEST
1	67896789678967	Gift Card	\$0.00	0	0	0.00%	TEST	TEST	TEST

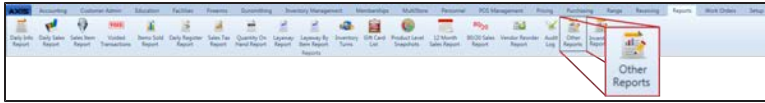
2. Complete the following procedures as needed to modify the list displayed on the screen:

- Use the scroll bar(s).
- [Sort and Filter Onscreen Data \(see page 40\)](#).

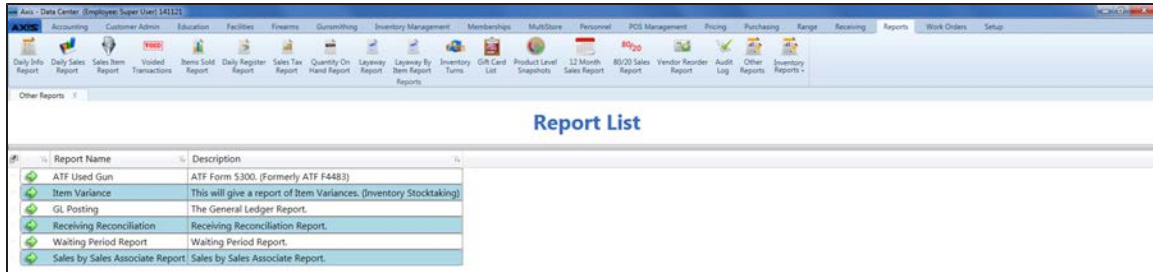
3. Click the tab's **Close** button to close the screen.

View the Receiving Reconciliation Report

1. Navigate to the **Report List** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **Receiving Reconciliation** report to display the report in the **Report Viewer** window.
3. Complete the following procedure to set parameters for the report:
 1. Click the **Parameters** button to display parameter controls.
 2. Enter/select report criteria in the fields as needed.
 3. Click the **Submit** button.
 4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and/or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

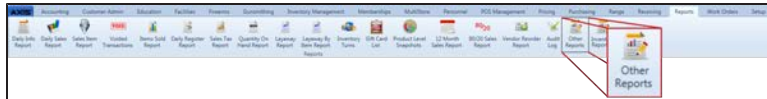
6. Click the **Close** button to close the **Report Viewer** window.
7. Click the tab's **Close** button to close the screen.

View the Sales by Sales Associate Report

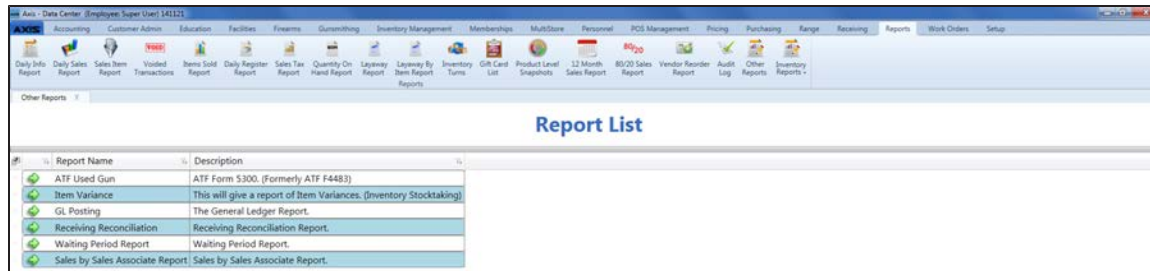
Complete the following procedure to generate and view a record of every sales associate (logged in user) who completed or received credit for the sale of an item, every sale for which the associate received credit, and the Gross Profit for each sale expressed in dollars (**GP \$**) and percentage (**GP %**).

1. Navigate to the **Report List** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Other Reports** from the main menu to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **Sales by Sales Associate Report** option to display the report in the **Report Viewer** window.



3. Complete the following procedure to set parameters for the report:

1. Click the **Parameters** button to display parameter controls.
2. Enter/select report criteria in the fields as needed.
3. Click the **Submit** button.
4. Click the **Parameters** button to close parameter controls.

4. Use the scroll bar(s) and or page controls as needed to view the entire report.

5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

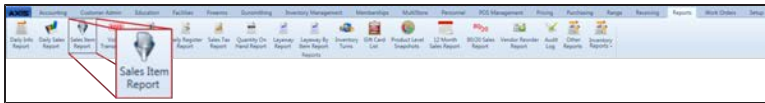
1. Click the **Export** button to display a drop-down menu of options.
2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
3. Browse to the desired location.
4. If needed, edit the document name in the **File name** field.
5. Click the **Save** button to save the document.

-
6. Click the **Close** button to close the **Report Viewer** window.
 7. Click the tab's **Close** button to close the screen.

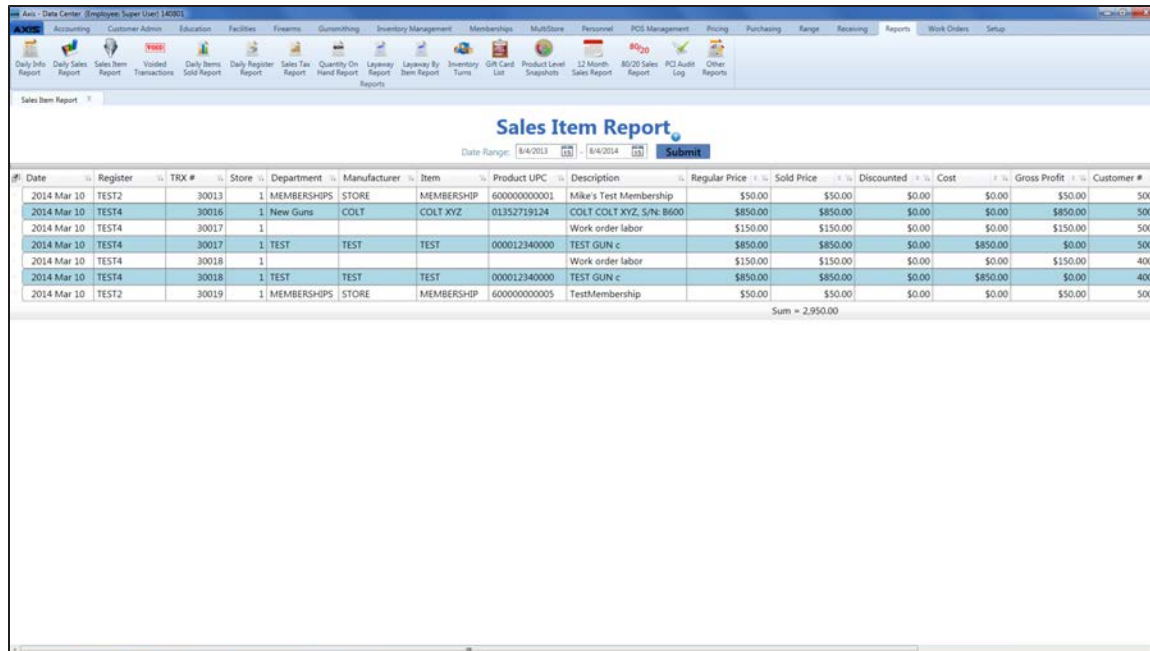
View the Sales Item Report

1. Navigate to the **Sales Item Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Sales Item Report** from the main menu to display the **Sales Item Report** screen.
3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).



The screenshot shows the 'Sales Item Report' screen. At the top, there is a 'Date Range' field with '3/4/2013' and '3/4/2014' entered, and a 'Submit' button. Below this is a table with the following data:

#	Date	Register	TRX #	Store	Department	Manufacturer	Item	Product UPC	Description	Regular Price	Sold Price	Discounted	Cost	Gross Profit	Customer #
	2014 Mar 10	TEST2	30013	1	MEMBERSHIPS	STORE	MEMBERSHIP	600000000001	Mike's Test Membership	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00	5006
	2014 Mar 10	TEST4	30016	1	New Guns	COLT	COLT XYZ	01352719124	COLT COLT XYZ, S/N: B600	\$850.00	\$850.00	\$0.00	\$0.00	\$850.00	5005
	2014 Mar 10	TEST4	30017	1					Work order labor	\$150.00	\$150.00	\$0.00	\$0.00	\$150.00	5005
	2014 Mar 10	TEST4	30017	1	TEST	TEST	TEST	000012340000	TEST GUN c	\$850.00	\$850.00	\$0.00	\$850.00	\$0.00	5005
	2014 Mar 10	TEST4	30018	1					Work order labor	\$150.00	\$150.00	\$0.00	\$0.00	\$150.00	4005
	2014 Mar 10	TEST4	30018	1	TEST	TEST	TEST	000012340000	TEST GUN c	\$850.00	\$850.00	\$0.00	\$850.00	\$0.00	4005
	2014 Mar 10	TEST2	30019	1	MEMBERSHIPS	STORE	MEMBERSHIP	600000000005	TestMembership	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00	5006

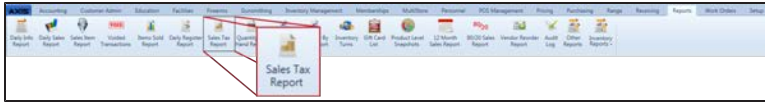
Sum = 2,950.00

2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

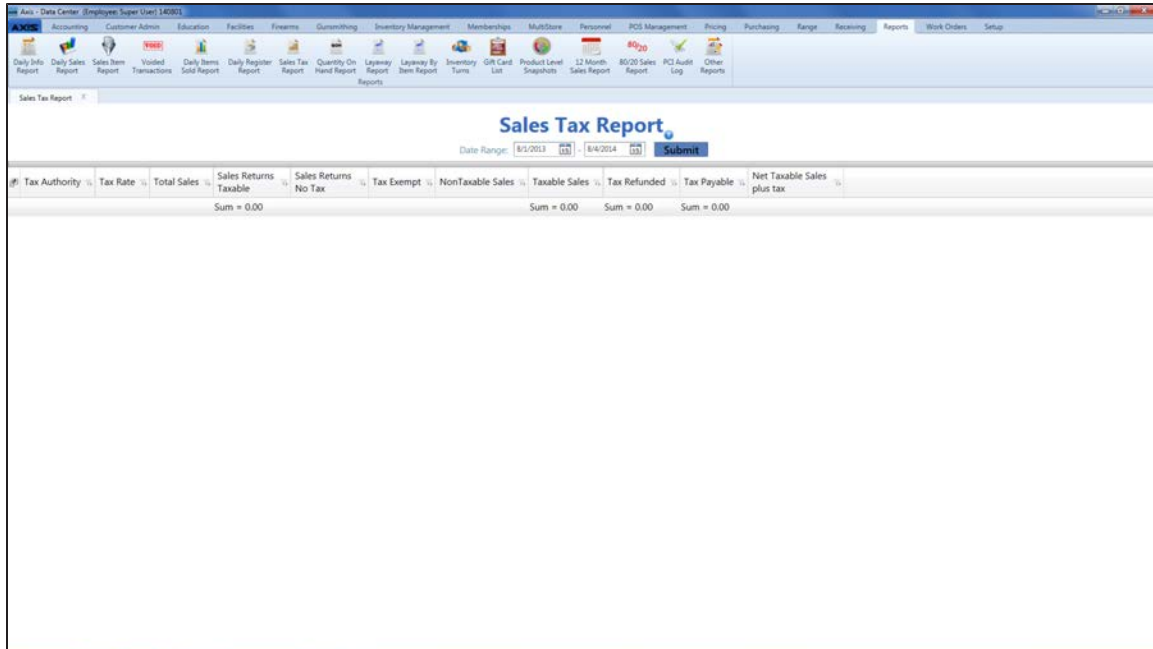
View the Sales Tax Report

1. Navigate to the **Sales Tax Report** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Sales Tax Report** from the main menu to display the **Sales Tax Report** screen.
3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).

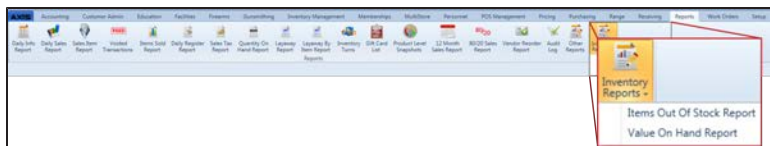


2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Click the tab's **Close** button to close the screen.

View the Value On Hand Report

Complete the following procedure to generate and view a record of the quantity, total costs, and total value for every item in inventory.

1. Navigate to the **Value On Hand Report** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Inventory Reports > Value On Hand Report** from the main menu to display the **Value On Hand Report** screen.

Department	UPC	Item Description	Manufacturer	Item	Qty	Avg Cost	Ext Avg Cost	Last Cost	Retail Price	Ext Retail Price
ACCESSORIES	61024200036	Lasergrip Standard Polymer KelTec P3AT	CRIMSON TRACE	WEAPON LIGHT LASER	70	125.0000	8750.0000	125.0000	125.0000	8750.0000
ACCESSORIES	99999999001	Gloves, men's large	TEST	TEST ITEM	53	0.1740	9.2485	1.8500	0.0000	0.0000
ACCESSORIES	99999999002	Boots, men's size 12	TEST	TEST ITEM	31	4.4435	137.7485	27.5500	0.0000	0.0000
ACCESSORIES	99999999003	Hat, men's stocking cap	TEST	TEST ITEM	39	0.1348	5.2494	0.7500	1.5000	58.5000
AMMUNITION	234567891234	10in of wet snow	BLACKHAWK	GUNSAFE	0	0.0000	0.0000	0.0000	45.0000	0.0000
FIREARMS	01352719124	TEST FIREARM A	COLT	PISTOL	69	771.7361	53246.9979	750.0000	850.0000	58650.0000
FIREARMS	01352719125	TEST FIREARM B	COLT	PISTOL	50	814.9800	40749.0000	799.0000	899.9700	44998.5000
FIREARMS	023614259558	test firearm	COLT	TEST	13	615.3846	7999.9998	500.0000	500.0000	6500.0000
FIREARMS	99900999001	Used Firearm: Handgun	STORE	HANDGUN	0	0.0000	0.0000	0.0000	0.0000	0.0000
FIREARMS	99900999002	Used Firearm: Longgun	STORE	LONGGUN	0	0.0000	0.0000	0.0000	0.0000	0.0000
FIREARMS	99999999007	firearm	TEST	HANDGUN	2	200.0000	400.0000	100.0000	125.0000	250.0000
SERIALIZED ITEMS	624853179123	Test Serialized Item	ARS	TEST ITEM	18	9.4444	169.9992	10.0000	20.0000	360.0000
TEST	000012340005	TEST GUN c	TEST	TEST GUN c	1	250.0000	250.0000	450.0000	450.0000	450.0000
TEST	034827032120	Revised granite bar	TEST	TEST	12	0.8424	0.4992	0.2500	1.0000	12.0000

2. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as needed.
3. Click the **Report** tab to display the report.

Note: The report reflects the filters and controls selected on the **Raw Data** tab.

Department	UPC	Item Description	MFG #	Manufacturer	Item	Qty	Avg Cost	Ext Avg Cost	Last Cost	Retail Price	Ext Retail Price
ACCESSORIES	61024200036	Lasergrip Standard Polymer KelTec P3AT	LG-430	CRIMSON TRACE	WEAPON LIGHT LASER	70	\$125.00	\$8,750.00	\$125.00	\$125.00	\$8,750.00
ACCESSORIES	99999999001	Gloves, men's large	TEST	TEST	TEST ITEM	53	\$0.17	\$9.25	\$1.85	\$0.00	\$0.00
ACCESSORIES	99999999002	Boots, men's size 12	TEST	TEST	TEST ITEM	31	\$4.44	\$137.75	\$27.55	\$0.00	\$0.00
ACCESSORIES	99999999003	Hat, men's stocking cap	TEST	TEST	TEST ITEM	39	\$0.13	\$5.25	\$0.75	\$1.50	\$58.50
AMMUNITION	234567891234	10in of wet snow	BLACKHAWK	BLACKHAWK	GUNSAFE	0	\$0.00	\$0.00	\$0.00	\$45.00	\$0.00
FIREARMS	01352719124	TEST FIREARM A	COLT	COLT	PISTOL	69	\$771.74	\$53,247.00	\$750.00	\$850.00	\$58,650.00
FIREARMS	01352719125	TEST FIREARM B	COLT	COLT	PISTOL	50	\$814.98	\$40,749.00	\$799.00	\$899.97	\$44,998.50
FIREARMS	023614259558	test firearm	TEST	COLT	PISTOL	13	\$615.38	\$8,000.00	\$500.00	\$500.00	\$6,500.00
FIREARMS	99900999001	Used Firearm: Handgun	STORE	STORE	HANDGUN	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FIREARMS	99900999002	Used Firearm: Longgun	STORE	STORE	LONGGUN	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FIREARMS	99999999007	firearm	TEST	TEST	HANDGUN	2	\$200.00	\$400.00	\$100.00	\$125.00	\$250.00
SERIALIZED ITEMS	624853179123	Test Serialized Item	ARS	ARS	TEST ITEM	18	\$9.44	\$170.00	\$10.00	\$20.00	\$360.00

4. If desired, complete the following procedure to print the report:
 1. Click the **Print report** button to display the **Print** window.
 2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
 3. Click the **Print** button to print the document.
5. Click the tab's **Close** button to close the screen.

View the Vendor Reorder Report

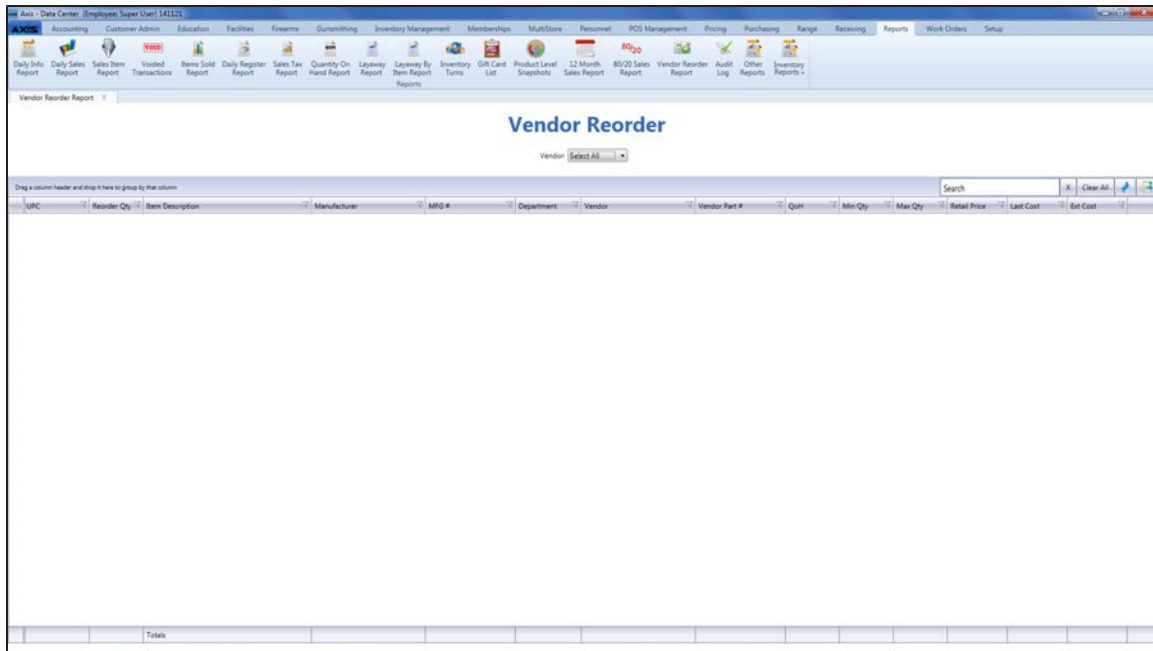
Complete the following procedure to generate and view a record of items that have fallen below their minimum inventory level.

1. Navigate to the **Vendor Reorder** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Vendor Reorder Report** from the main menu to display the **Vendor Reorder** screen.



2. Select a vendor from the **Vendor** drop-down to display a list of the vendor's items with inventory values below their minimum levels. (Select the **Select All** option to view items from all vendors.)

Note: An item with a QOH that is lower than its minimum level will not display if either of the following is true:

- The item is not associated with the selected vendor(s).
- The item's on-order quantity is sufficient to bring its inventory value up to or above its maximum value.

3. [Sort and Filter Reporting Screen Data \(see page 44\)](#) as needed.
4. Click the tab's **Close** button to close the screen.

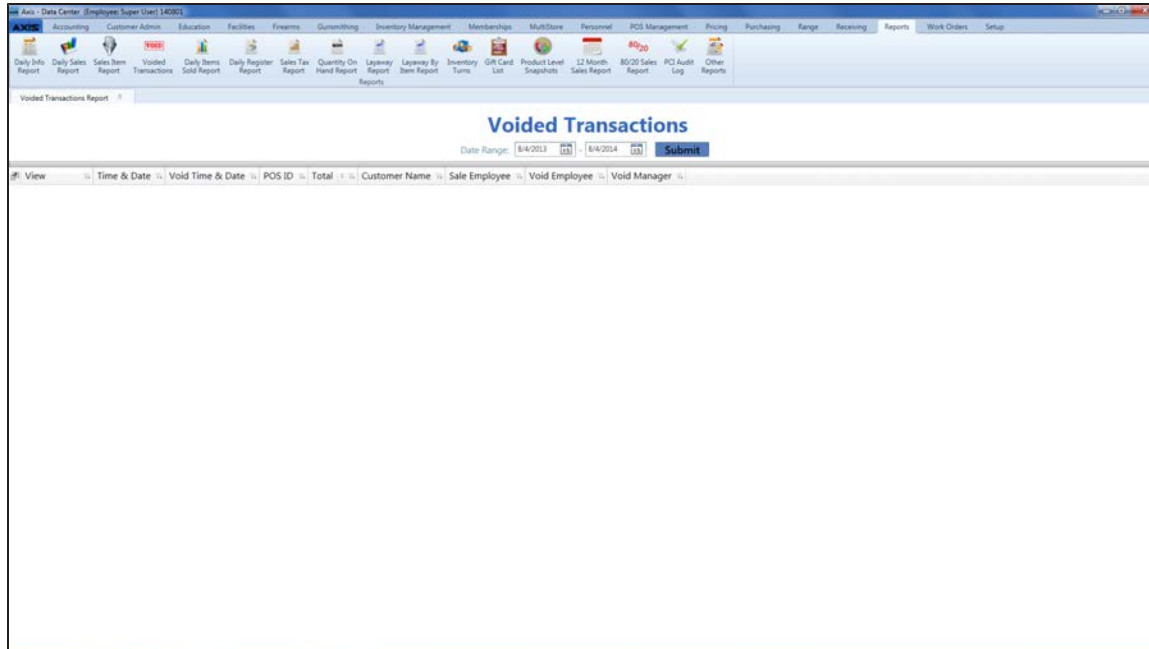
View the Voided Transactions Report

1. Navigate to the **Voided Transactions** screen.

1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.



2. Select **Reports > Voided Transactions** from the main menu to display the **Voided Transactions** screen.
3. Enter starting and ending dates in the **Date Range** fields and click the **Submit** button to display data from the entered date(s).

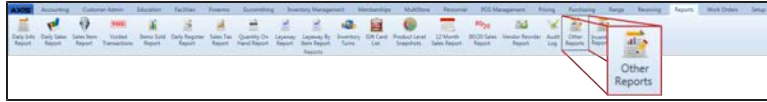


2. Complete the following procedures as needed to modify the list displayed on the screen:
 - Use the scroll bar(s).
 - [Sort and Filter Onscreen Data \(see page 40\)](#).
3. Complete the following procedure to view details for a specific transaction:
 1. Click a transaction's **View** button to view its **Voided Transaction Detail** window.
 2. If needed, [Sort and Filter Onscreen Data \(see page 40\)](#).
 3. Click the **OK** button to close the window.
4. Click the tab's **Close** button to close the screen.

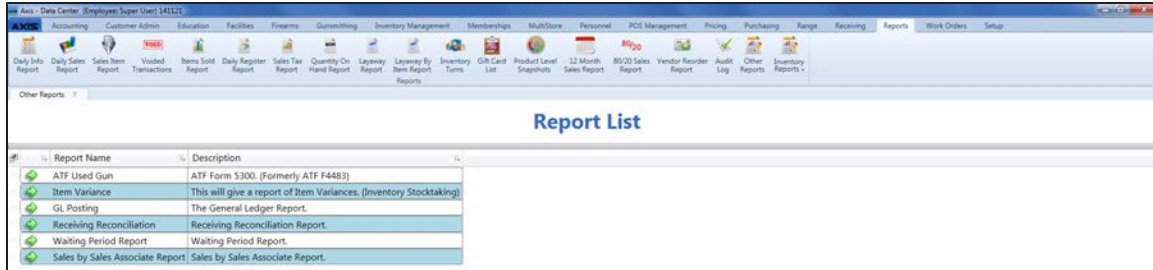
View the Waiting Period Report

Complete the following procedure to generate and view a list of every customer who is in a waiting period to receive a firearm, the firearm to be transferred, and the date/time when the waiting period ends.

1. Navigate to the **Report List** screen.
 1. [Log In to the Data Center Application \(see page 16\)](#) to display the **Data Center Main Menu** screen.

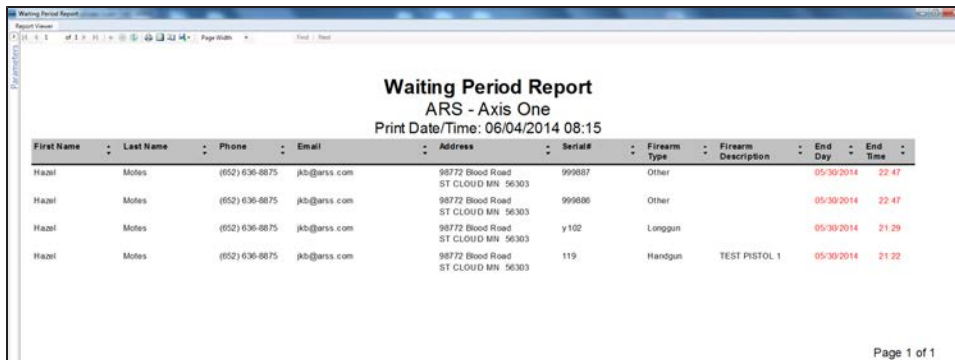


2. Select **Reports > Other Reports** to display the **Report List** screen.



2. Click the **Execute Report** (green arrow) button for the **Waiting Period Report** option to display the report in the **Report Viewer** window.

Note: If the waiting period has ended, its **End Day** and **End Time** columns will be highlighted in red



3. Complete the following procedure to set parameters for the report:
 1. Click the **Parameters** button to display parameter controls.
 2. Enter/select report criteria in the fields as needed.
 3. Click the **Submit** button.
 4. Click the **Parameters** button to close parameter controls.
4. Use the scroll bar(s) and or page controls as needed to view the entire report.
5. Complete the following procedures as appropriate:

Print the Report

1. Click the **Print** button to display the **Print** window.
2. Modify print options (e.g., select a different printer, adjust settings, etc.) as needed.
3. Click the **Print** button to print the document.

Save the Report as an Electronic File

1. Click the **Export** button to display a drop-down menu of options.
 2. Click the desired option (**Excel**, **PDF**, or **Word**) to display the **Save As** window.
 3. Browse to the desired location.
 4. If needed, edit the document name in the **File name** field.
 5. Click the **Save** button to save the document.
-
6. Click the **Close** button to close the **Report Viewer** window.
 7. Click the tab's **Close** button to close the screen.